

EXHIBIT C

2 LiveVox – User Login - LiveVox Voice Portal

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2 LiveVox – User Login - LiveVox Voice Portal

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Dev Campaign Monitor Portal													
Campaign		Reports		Administration		Tools		Help		Sign On			
<input type="radio"/> Campaign		<input type="radio"/> ACD											
Skills / Queues													
Skill / Queue		Progress		Activity		Connect		Reports		Actions			
Total	Remain	% Done	\$ Charge	CIP	Talk	Wait	Hold	Connect	No Conn.	Transfer	Today	MTD	Past
Call Center Four	0	0	0	0	0	0	0	0	0	0	0	0	0
Call Center One	1	1	0	0	0	0	0	0	0	0	0	0	0
Las Vegas	0	0	0	0	0	0	0	0	0	0	0	0	0
New York	0	0	0	0	0	0	0	0	0	0	0	0	0

- Skill view:

Dev Campaign Monitor Portal													
Campaign		Reports		Administration		Tools		Help		Sign On			
<input type="radio"/> Campaign		<input type="radio"/> ACD											
Skills / Queues													
Skill / Queue		Progress		Activity		Connect		Reports		Actions			
Total	Remain	% Done	\$ Charge	CIP	Talk	Wait	Hold	Connect	No Conn.	Transfer	Today	MTD	Past
Attendant/Transfer 1	0	0	0	0	0	0	0	0	0	0	0	0	0
Attendant/Transfer 2	0	0	0	0	0	0	0	0	0	0	0	0	0
CCS (Unanswered, hold)	0	0	0	0	0	0	0	0	0	0	0	0	0

The information available on the main page summarizes real time skill activity.

This information includes:

- Total - Total calls loaded to the skill
- Remain - Calls remaining to be launched in the skill or call center
- % Done - Percent of calls completed ("% done")
- \$ Charge - Charges associated with each skill or call center
- CIP - Current calls in progress (CIP)
- Talk - Current talking calls (calls currently connected to agents)
- Wait - Current calls waiting (calls in queue)
- Hold - The longest single hold duration for a call in the queue
- Connect - Real time aggregate of connected calls
- No Conn. - Calls that terminated in no connection
- Transfer - Total number of successful agent transfers
- Reporting links – Links to Today, MTD and Past reports

LIVEVOX - USER LOGIN

To login to the LiveVox system:

- Go to your custom URL that was provided by LiveVox
<https://www.tthclient.com/ClientName/Voiceportal>
- Enter Client Name (provided by Livevox)
- Enter username (Login ID)
- Enter password
- Click the 'Login' button

Please log in	
Client Name:	<input type="text"/>
Username:	<input type="text"/>
Password:	<input type="password"/>
<input type="button" value="Login"/>	



Username and password are case sensitive

With the password management functionality enabled, the following also applies:

- User passwords must be a minimum of eight alpha-numeric characters length and must be different from the last 3 passwords used for that user.
- User passwords expire after a specified period of time, defaulting at 90 days.
- Three failed login attempts lock out users. Follow the instructions in section 4.5 to unlock a user.

Upon logging in, you will be brought to the main screen where you can see all skills.



A skill is a predefined shell where you can set attributes such as script, call flow, phone numbers, and pacing. The skill is what the agents log into to receive calls that their username has access to. The LiveVox agent grouping hierarchy can be viewed as follows: Enterprise → Call Center → Skill → Campaign → Agent.

You can view basic dialling result information for each of the skills from the main screen, or drill down to individual skill pages to access detailed information by clicking skill names under each active call center.

- Call center view:

3.9 DRG and Classification Call Routing Options - LiveVox Voice Portal

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Related Topics

[Agent Setup](#)

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PA8

- "Longest Available Agent" is the default mode. This setup must be changed in order to ensure another selection.
- "Strict classification" - when there are no agents logged in with the proper classification in inbound blending, system can be setup to play either a no answer message, or transfer the call to the voicemail number. Outbound calls can only utilize the no answer phrase.

- Call Priority



Call Priority is considered only if the call is placed into a queue due to no agents with proper classification being available. If agent with proper classification is available, Call Priority will have no impact on routing of the call.

- LiveVox supports up to 100 levels of call priority.
- By default the priority is set to 100.
- If priority is set outside of the supported values, the call will receive the default priority of 100.
- Calls with lower priority values are transferred ahead of calls with higher priority value (E.g. Calls with priority 1 will always transfer before calls with priority 2).
- If two calls have same priority, they are routed based on first in, first out.

Priorities can be set for one of these templates: A_MASTER_1, A_MASTER_2 and INB_A_XFER_4 via the Message Editor in the Config. Mgr.

DRG AND CLASSIFICATION CALL ROUTING OPTIONS

The following routing configuration options are available:

- Agent selection (routing target) settings available via Dynamic Resource Group (DRG)
 - *Longest Available Agent* – If no agents with the proper classification are available to take the call it will be transferred to the longest available agent in the same resource group regardless of classification.
 - *Strict Classification* – If no agents with the proper classification are available to take the call the call is put on hold until an agent with proper classification becomes available. Hold time can be configured in the template. Once the maximum hold time is reached, the call will be terminated.
 - *Strict Classification with Overflow* – If no agents with the proper classification are available to take the call it will be put on hold until the maximum hold time (configured in the template) is reached. At this time the system will expand the target selection to include all agents in the DRG and the call will be bridged to the longest available agent. If no agents are available, the system will continue searching until one becomes available (no more max hold time action).

Name	Type	Enabled
ACD 2.4 DRG_1	STRICT_CLASSIFICATION	true
ACD 2.4 DRG_2	STRICT_OVERFLOW	true
ACD 2.4 DRG_3	LONGEST_AVAILABLE_AGENT	true

By selecting the desired resource group in ACD and pressing the 'Edit' option rollover type can be changed.

Resource Group List

Name	Type	Enabled
1745175 DEBT CO HOSTLES ROM SER TEST1 TEST2 TEST3 TEST4	LONGEST_AVAILABLE_AGENT	

Edit Resource Group

Name: 1745175_RESOURCE_GRP

Type: LONGEST_AVAILABLE_AGENT

Selected Resource Group Type: LONGEST_AVAILABLE_AGENT

Strict Classification

Submit Cancel

Previous Edit





Proficiency level 1 = highest and Proficiency Level 5 = lowest

Agent

Classification vs Agent Mapping

Classification:	Proficiency: <input type="button" value="1"/>						
<table border="1"> <thead> <tr> <th>Available Agents</th> <th>Assigned Agents</th> </tr> </thead> <tbody> <tr> <td> AC2B ALEXALEXALEX ANTHONY BALZ BALA_TEST CAV_GI CAV_KRIS CAV_JE_NEV CCLARK CVTEST1A DEMO2_TWALDHEU DEMO_TEST DURRIS_LV EUTEST ENTERPRISE2II CAJL GCLAPP GL_CAVALRY OSOMYZEL JASON_CAVALRY JOEHO2 KFDENOC KFDENOC2 JUORRIS_CAV JUORRIS_DEMO2 JWALL JOSESUPER </td> <td> CAV_GAVIO (level 5) DEMO (level 1) JODEMOC2 (level 4) RUTEST (level 2) </td> </tr> <tr> <td align="center"><input type="button" value="→"/></td> <td align="center"><input type="button" value="←"/></td> </tr> </tbody> </table>		Available Agents	Assigned Agents	AC2B ALEXALEXALEX ANTHONY BALZ BALA_TEST CAV_GI CAV_KRIS CAV_JE_NEV CCLARK CVTEST1A DEMO2_TWALDHEU DEMO_TEST DURRIS_LV EUTEST ENTERPRISE2II CAJL GCLAPP GL_CAVALRY OSOMYZEL JASON_CAVALRY JOEHO2 KFDENOC KFDENOC2 JUORRIS_CAV JUORRIS_DEMO2 JWALL JOSESUPER	CAV_GAVIO (level 5) DEMO (level 1) JODEMOC2 (level 4) RUTEST (level 2)	<input type="button" value="→"/>	<input type="button" value="←"/>
Available Agents	Assigned Agents						
AC2B ALEXALEXALEX ANTHONY BALZ BALA_TEST CAV_GI CAV_KRIS CAV_JE_NEV CCLARK CVTEST1A DEMO2_TWALDHEU DEMO_TEST DURRIS_LV EUTEST ENTERPRISE2II CAJL GCLAPP GL_CAVALRY OSOMYZEL JASON_CAVALRY JOEHO2 KFDENOC KFDENOC2 JUORRIS_CAV JUORRIS_DEMO2 JWALL JOSESUPER	CAV_GAVIO (level 5) DEMO (level 1) JODEMOC2 (level 4) RUTEST (level 2)						
<input type="button" value="→"/>	<input type="button" value="←"/>						
<input type="button" value="Save"/>							

Related Topics

[Agent Setup](#)

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3.8 Agent Classification - LiveVox Voice Portal

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AGENT CLASSIFICATION

Agent Classification allows managers to classify agents based on a type of skill the agents may possess, the type of clients they handle, or their proficiency (level of expertise) handling the calls. For example, managers may assign classifications based on multi-language capabilities or strong collection experience and link them to accounts that require these qualifications.



This feature needs to be requested. Classification groups are currently pre-defined and controlled through the LiveVox backend.

- When enabled, the Classification tab is available on the ACD page. A Manager will see a list of pre-defined Agent Classifications by choosing "List" (navigate from Classification tab to List).

Classification	Description
GOLD (1022)	GOLD
PLATINUM (1023)	PLATINUM
SILVER (1021)	SILVER

- All pre-defined agent classifications will have an ID displayed next to their name (as shown above). These ID's can be used when configuring classification through Message Editor in Config. Mgr.
- Managers can sort and refresh the list
- Navigate to mapping by selecting Mapping and choose to assign by agent or by classification.

Classification	Description
GOLD (1022)	GOLD
PLATINUM (1023)	PLATINUM
SILVER (1021)	SILVER

- Managers are able to:
 - Map an agent to an available classification and assign proficiency 1 through 5.
 - Select the Proficiency level and then select those agents from the Available Agents list and move them to the Assigned Agents list.
 - Save and select another Proficiency level and repeat these steps to assign agents at a different level. You cannot assign and save more than one proficiency level at a time.

3.7 Resource Grouping

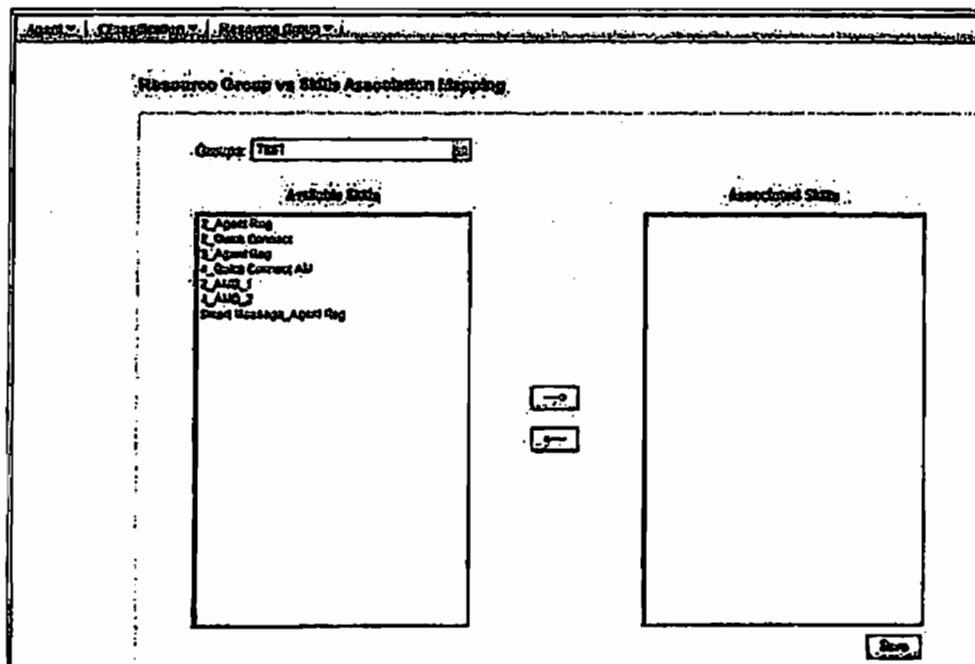
- LiveVox Voice Portal

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- Associate by Group or Skill

To "associate" means to map a Resource Group, a group of outbound skills, to an inbound skill. This enables inbound/outbound blending by defining the pool of agents available to an inbound skill. Inbound calls will then be routed to available agents within the resource group.

Associating resource groups to an inbound skill is handled via the arrow keys similar to mapping skills to a resource group or mapping agents to a skill.

**Related Topics**[Agent Setup](#)

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3.7 Resource Grouping

- LiveVox Voice Portal

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Resource Group vs Skill Assignment Mapping

Group: ATL_1ST PARTY RO

Available Skills	Assigned Skills
ATL_1stParty_Rebound_0775430003 (7)	ATL_Security_ProvAll_QC_Cable_Sort_WDP (5)
ATL_1stParty_Recovery_Meritus_VDP - 1021	ATL_1stParty_Provider_ATL_QC (10)
ATL_1stParty_Recovery_Meritus_VDP - 1022	ATL_1stParty_Proviver_ATL_QC_Driver_Sort (5)
Atlanta_PSC_Manual_Outbound (4)	ATL_1stParty_Recovery_Meritus (10)
Atlanta_PSC_Preview_ATL_QC (5)	ATL_1stParty_Recovery_Meritus_VDP (10)
Atlanta_PSC_DC_VDP (2)	ATL_1stParty_Recovery_PPC (2)
Atlanta_PSC_JPC (1)	ATL_1stParty_Recovery_PPC (1)
Atlanta_Phone24_Services_Inbound_0775430003	Inbound
Denver_Inbound_Fax247003 (3)	test_ATL_1stParty_Preview_All_DC_Cable_Sor
Denver_Jetfuel_Outbound (4)	
Denver_Preview All_QC (5)	
Denver_PPC (2)	
Denver_JPC (1)	
Executive_20964_meritus_pcl	
Executive_Preview_ATL_QC (14)	
Executive_Preview_Delta (7)	
Executive_DC_1 (14)	
Executive_DC_2 (14)	
Executive_DC_3 (14)	
Executive_DC_4 (22)	
Executive_JPC_1 (1)	
Executive_JPC_2 (2)	
Executive_JPC_3 (2)	
Executive_JPC_4 (4)	
Executive_JPC_5 (3)	
Executive_JPC_6 (3)	
Executive_JPC_7 (7)	

Save

- Mapping resource groups by skill

Skill vs Resource Group Assignment Mapping

Cell Centers: AB

Skills: ATL_1stParty_PrevAll_QC_Cable_Sort_WDP

Available Resource Groups	Assigned Resource Groups
ATL_FIN SRVCS RO	ATL 1ST PARTY RO
DRO_INBOUND_20577	DENVER_SMART_MESSAGE
DRO_INBOUND_20579	
ENGLISH_RESOURCE_GROUP	
RESOURCE_GROUP_A	
STARK DRO	

Save

RESOURCE GROUPING

Agents are able to receive inbound calls while they are simultaneously participating in outbound campaigns. This feature, Call Blending, is enabled by the establishment of a Resource Group, which collates agents otherwise segmented into separate skills into a pool of agents able to receive inbound calls. In other words, Resource Group defines which outbound skills agents should be logged into to receive inbound calls, providing a blended ACD environment.

- The "Resource Group" tab is available from the ACD page if there is an active inbound skill Voice Portal.
- From this menu, a manager will be able to see a list of currently defined resource groups

A screenshot of a web-based application interface titled "Resource Group List". The table displays the following data:

Resource Group	Type	Longest Available Age
TEST		000
TEST2		000
SMARTMESSAGE GROUP	LONGEST_AVAILABLE_AGE	000

Navigation links at the top: << first < prev 1 next > last >>. Navigation links at the bottom: << first < prev 1 next > last >>. Buttons: Return, Exit.

- Select Add from the Resource Group dropdown menu to add resource groups.

A screenshot of a web-based application interface titled "Add Resource Group". The form includes fields for "Name:" (with an empty input field) and "Type:" (with a dropdown menu labeled "Select Resource Group Type"). A "Submit" button is located below the type selection.

- Map by Group or Skill – allows user to define skills available to the resource group. This is similar to placing agents in skills, or vice versa. The Inbound skill(s) should be selected in the "Map Inbound" section, and the outbound skill(s) from the "Map Outbound" section (Additional instructions in section 3.9.1). Callers to the inbound skill in the Resource Group will then be routed to agents logged into the outbound skills listed in the Group.

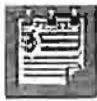
A screenshot of a web-based application interface titled "Assignment Mapping". The screen shows a dropdown menu with options: "By Group" and "By Skill". Below the dropdown is a field labeled "Groups:" with the placeholder text "Select a group." and a small "x" icon.

- Mapping resource groups by group.

AGENT SPECIFIC ROUTING

Inbound calls can be routed to the specific agent that is assigned to an account or to the agent that last spoke to the consumer. Agent-specific routing requires the Agent's ID to be sent in the input file and must match the Agent ID that is added to the Agent ACD grid.

- When agent-specific routing is enabled, the following routing logic is utilized:
 - Call is routed to the agent that is assigned in input file (clients will need to provide this information in the file).
 - If not available, the call is rouled to the agent who last spoke with the consumer.
 - If not available, the call is routed to the longest available agent.



Agent specific routing can be turned ON or OFF at the skill level. The default mode is OFF.

Related Topics

[Agent Setup](#)

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3.5 Import - LiveVox Voice Portal

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IMPORT

Import feature allows users to import lists of agent profile information.

- To import choose Agent and Import from the main ACD screen.

The screenshot shows the 'Agent' screen of the LiveVox Voice Portal. On the left, there is a sidebar with options: List, Add, Mapping, Export, and Import. The 'Import' option is highlighted. The main area has tabs for Classification and Resource Group. A central dialog box is open with the title 'Please upload the Import data file'. It contains a text input field labeled 'Import File:' and a 'Browse...' button. Below this is a note: 'Note: data format for each row is as following format:
login ID,password,first name,last name,phone number,active,skill id1,skill id2
e.g. LXE.1234,Alexander,michael,4057786612,1,1234,7608'. At the bottom of the dialog are 'Submit' and 'Reset' buttons.

- Browse to the location of the file you wish to upload.
- Data format is specified on the screen and should be comma delimited.



- If the import function is used for an agent already set up in the system, the system will scrub the file and exclude that Agent except in the following scenario:*
- If any other fields are different – password, name spelled differently, the system will overwrite those altered fields.*
- To assign agent access to specific skills, you will need to use the LiveVox skill_id. This information can be found in the Configuration Manager.*
- The list of skill IDs can only include up to 12 individual entries. Including a 13th skill ID will cause the import to fail. Please see Agent vs. Skill Mapping (section 3.3.1) or Skill vs. Agent Mapping (section 3.3.2) for instructions on how to map agents to skills.*

Related Topics

[Agent Setup](#)

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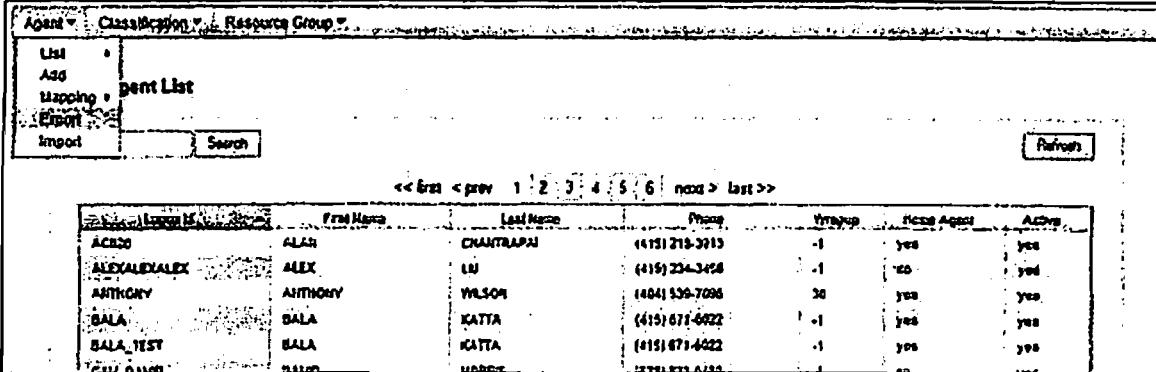
3.4 Export - LiveVox Voice Portal

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EXPORT

The Export feature allows users to export lists of agent profile information.

- To export choose Agent and Export from the main ACD screen



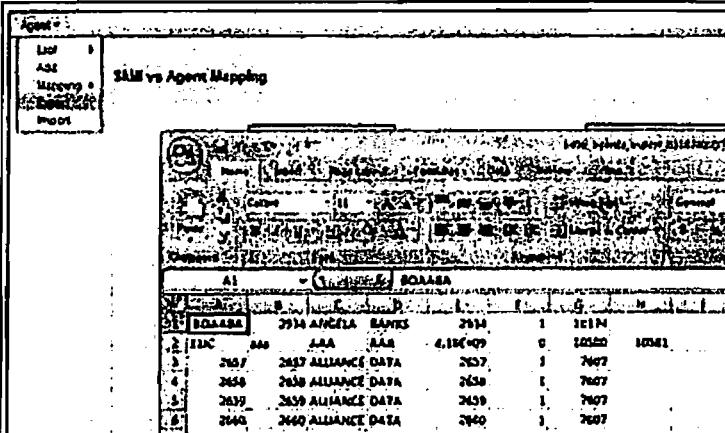
The screenshot shows a table of agent profiles with the following columns: Login ID, First Name, Last Name, Phone, Virtusip, Home Agent, and Active. The data is as follows:

Login ID	First Name	Last Name	Phone	Virtusip	Home Agent	Active
ACSO	ALAN	CHANTAPASU	(415) 213-3713	-1	yes	yes
ALEXALEXALEX	ALEX	LJ	(415) 234-3458	-1	no	yes
ANTHONY	ANTHONY	WILSON	(404) 539-7296	30	yes	yes
BALA	BALA	KATTA	(415) 671-6022	-1	yes	yes
BALA_TEST	BALA	KATTA	(415) 671-6022	-1	yes	yes
TELLER	MARIE	HARDY	(209) 873-6740	-1	no	yes

- This will export a file in CSV format with the fields required in the Agent setup
- User may look up agent password information from the file exported.



Data format for each row is as follows: login ID, password, first name, last name, phone number, active status, skill id1, skill id2, skill id3, etc.



The screenshot shows a table of SAIM vs Agent Mappings with the following columns: SAIM, Agent, and various skill IDs. The data is as follows:

SAIM	Agent	2914 ANGELA RAMOS	2914	1	2014	
1	AAA	AAA	4136479	0	2020	10381
2	2607	2607 ALLIANCE DATA	2607	1	7607	
3	2658	2658 ALLIANCE DATA	2658	1	7607	
4	2659	2659 ALLIANCE DATA	2659	1	7607	
5	2660	2660 ALLIANCE DATA	2660	1	7607	

Related Topics[Agent Setup](#)

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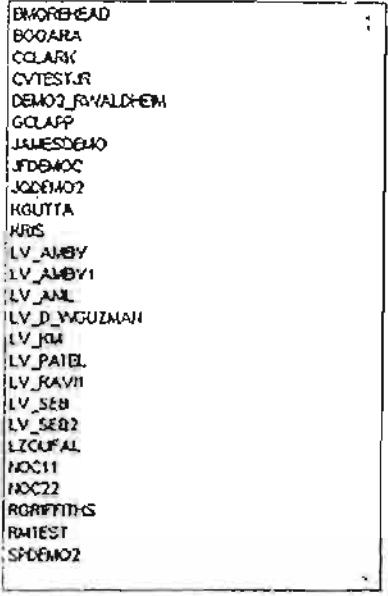
3.3.2 By Skill (Skill vs. Agent Mapping) - LiveVox Voice Portal

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Skill vs Agent Mapping

Call Centers:

Skills:

Available Agents		Assigned Agents	
			
<input type="button" value="→"/> <input type="button" value="←"/>			
<input type="button" value="Save"/>			

Related Topics[Mapping](#)Copyright (c) 2012 LiveVox, All Rights Reserved.

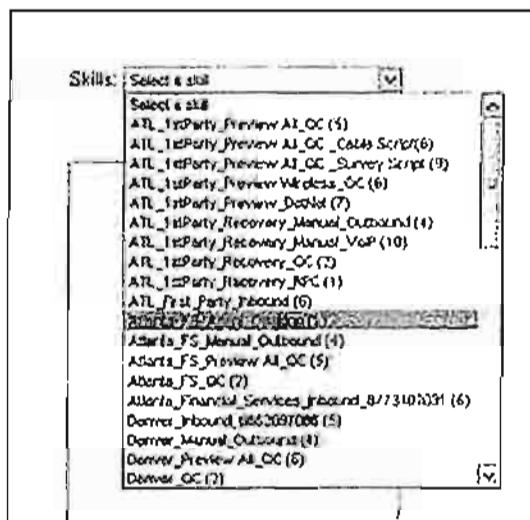
3.3.2 By Skill (Skill vs. Agent Mapping) - LiveVox Voice Portal

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BY SKILL (SKILL VS. AGENT MAPPING)

The following steps describe how to map multiple agents to and from a single skill:

- Choose the appropriate skill via the Skills dropdown list.



- Select the agent or agents in the available agents or assigned agents column by holding the CTRL key and clicking on the specific agents.
- Click on the appropriate arrow key located in the center of the page to move the selected agents.
- Choose 'Save' in the bottom right hand corner. A confirmation window appears when successful.

3.3.1 By Agent (Agent vs. Skill Mapping) - LiveVox Voice Portal

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Related Topics

Mapping

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3.3.1 By Agent (Agent vs. Skill Mapping) - LiveVox Voice Portal

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BY AGENT (AGENT VS. SKILL MAPPING)

To map individual agents to one or more skills, follow the steps described below:

- Choose the agent or Agent Login ID via the dropdown list.

Agents:	<input type="text" value="DEMO_AC"/>	OR
	Select an agent	<input type="button" value="▼"/>
	AMERIGALL	<input type="button" value="▼"/>
	BALA	<input type="button" value="▼"/>
	BURVIS	<input type="button" value="▼"/>
[ATL_1st]	BAIRDHEAD	<input type="button" value="▼"/>
[ATL_1st]	BOGARA	<input type="button" value="▼"/>
[ATL_1st]	COLARK	<input type="button" value="▼"/>
[ATL_1st]	CLAPPDR	<input type="button" value="▼"/>
[ATL_1st]	CLINT_TEST	<input type="button" value="▼"/>
[ATL_1st]	CLINTTEST	<input type="button" value="▼"/>
[ATL_1st]	DEMO2_JVALDHEM	<input type="button" value="▼"/>
[ATL_1st]	DEMO_AC	<input type="button" value="▼"/>
[ATL_1st]	DOUG	<input type="button" value="▼"/>
[ATL_Fx]	DR_LLV	<input type="button" value="▼"/>
[ABR_Fx]	GABESHORE	<input type="button" value="▼"/>
[Atlanta_Fx]	ODOFNEMAN	<input type="button" value="▼"/>
[Atlanta_Fx]	GCCLAPP	<input type="button" value="▼"/>
[Atlanta_Fx]	JAE SOENO	<input type="button" value="▼"/>
[Denver_X]	JETMO2	<input type="button" value="▼"/>
[Denver_X]	JETMO3	<input type="button" value="▼"/>
[Denver_X]	JETMO4	<input type="button" value="▼"/>

- Select the skill or skills in the available skills or assigned skills column by holding the CTRL key and clicking on the specific skills.
 - Click on the appropriate arrow key located in the center of the page to move the selected skills.
 - Choose 'Save' in the bottom right hand corner of the screen. A confirmation window will appear stating the change was successful.

3.3 Mapping - LiveVox Voice Portal

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MAPPING

Mapping is the process of granting an existing agent access to any skill(s) that were not assigned when the agent was created. This can be done by assigning a skill to an agent or an agent to a skill. LiveVox has provided both ways to do this to make the process more efficient.

Agent - Classification - Resource Group								
List Add Import Export B/ Agent B/ Skill Search	Refresh							
<< first < prev 1 2 3 4 5 6 next > last >>								
Agent	Classification	Resource Group	First Name	Last Name	Phone	Wage	Home Agent	Active
ACERS			ALAN	CHANTHAPAU	(415)316-3013	-1	yes	yes
ALICE ALEX			ALEX	LU	(415)234-3456	-1	no	yes
ANTHONY				WESON	(414)330-7804	30	yes	yes
BALA			BALA	KATTA	(415)871-6022	-1	yes	yes
BALA TEST			BALA	KATTA	(415)871-4022	-1	yes	yes
CAR DAVID			DAVID	MORRIS	(373)223-8486	-1	no	yes

Related Topics

Agent Setup

By Agent (Agent vs. Skill Mapping)

By Skill (Skill vs. Agent Mapping)

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3.2 Add (Set up an Agent) - LiveVox Voice Portal

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- Security and Password Management
 - When enabled by a Sysadmin in the configuration manager, password management features include enforcing proper password robustness, locking account after maximum failed attempts, and enforcing password expiration.
 - The password must be a minimum of 8 characters, containing at least 1 digit and cannot match any of the previous 3 passwords.
- Unique Agent Check
 - When adding an agent, verification can be done through the "check availability" option to check if this agent Login ID has been used.
- Wrap Up
 - Enables configuration of wrap time limits, and can be defined when adding or editing an agent's data. Agents with defined wrap up limits will be placed back into "Not Ready" status after the time elapses. Calls where agents are forced out of wrap will be terminated with a generic "Operator Transfer" result.



The default value is "-1", which allows agents to remain in wrap up mode until they select a termination code.

- Home Agent
 - Mark "Yes" if the agent uses different work stations/phone extensions in the office or can work remotely from home. They can enter a phone number and have the calls routed accordingly. "No" will not allow the agent to edit where their calls are being routed.
- Active Agent
 - Agent can be active or inactive by simply marking the appropriate radio button. Inactive agents have had their account disabled and are moved to the Inactive Agent Screen.
- To choose the skills that an agent has access to click on skills listed in the Skill window. Highlight multiple skills by holding down the CTRL key and clicking with the mouse.
- Click 'Submit'.
- A confirmation window will appear stating the user has been added.
- If an error message is displayed instead of the "Successfully Added Agent" message, correct the indicated field and click "Submit" again.



Please note that with ACD v. 2.4+ agents are no longer able to log into inbound skills.

Related Topics

[Agent Setup](#)

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3.2 Add (Set up an Agent) - LiveVox Voice Portal

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ADD (SET UP AN AGENT)

To set up an agent:

- Select Add from the Agent menu.

First Name	Last Name	Phone	Manager	Home Agent	Active
ALAN	CHANTRAYI	(419) 315-7913	-1	yes	yes
ALEX	LU	(419) 224-3438	-1	no	yes
ANTHONY	WILSON	(404) 538-7208	10	yes	yes

The following screen will be displayed:

Add Agent

NEW_USER is available

Logon ID:	<input type="text" value="new_user"/>	<input type="button" value="check availability"/>
First Name:	<input type="text"/>	
Last Name:	<input type="text"/>	
Password:	<input type="password"/>	
Re-typePassword:	<input type="password"/>	
Note: password must be at least eight characters long and contains at least one digits		
Wrapup Time:	<input type="text" value="-1"/>	
Note: default -1 (unlimited)		
Phone Number/Extension:	<input type="text"/>	
Home Agent:	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Active Agent:	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Skill:	<input type="checkbox"/> ATL_1stParty_Preview All_QC (5) (19891) <input type="checkbox"/> ATL_1stParty_Preview All_QC_Cable Script(8) (2688) <input type="checkbox"/> ATL_1stParty_Preview All_QC_Survey Script (9) (27 <input type="checkbox"/> ATL_1stParty_Preview Wireless_QC (6) (20966)	
<input type="button" value="Submit"/>		

- Enter the Login ID, Password, First Name, Last Name, and the Phone number/Extension for that agent:
 - Agent IDs may only include the following characters: letters a-z, numbers 0-9, underscore (_) and dot (.)

3.1.2 Inactive Agents - LiveVox Voice Portal

Page 1 of 1

INACTIVE AGENTS

- To view inactive agents, navigate to the Inactive Agents page by selecting List and 'Inactive Agents' options from the Agent menu.
- Inactive agents are not able to log into the LiveVox system. Agents cannot be deleted, this is how administrators can manage who can or cannot log in.

First Name	Last Name	Phone	Extension	Home Agent	Active
ACROS	ALAN	(415) 671-6240	-1	no	yes
LADY	ALI	(415) 234-1768	-1	no	yes
ALEXANDRA	ALEX	(115) 234-3450	-1	no	yes
ANTHONY	ANTHONY	(178) 373-4959	-1	no	yes
BALA	BALA	(115) 671-6222	-1	yes	yes
BALA TEST	BALA	(115) 671-6222	-1	yes	yes
CAV. DAVID	DAVID	(170) 123-5450	-1	no	yes
CAV. DAVID	DAVID	(712) 233-0374	-1	no	yes

- Options available on Inactive agents page:
 - Search – allows you to search for an agent
 - Edit – allows you to edit agent information/revert status to Active (for details see Setup an Agent Section)
 - Refresh – allows you to refresh the list

First Name	Last Name	Phone	Extension	Home Agent	Active
AAAAA	BBB	(123) 444-6789	-1	no	no
ABANGESTHO	BBB	(115) 690-7112	-1	yes	no
CTEST	ALEX	(115) 234-3451	-1	no	no

Related Topics[Agents List](#)

3.1.1 Active Agents - LiveVox Voice Portal

Page 1 of 1

ACTIVE AGENTS

- Navigate to Active agents by selecting the 'ACD' link from the Administration drop down menu from the main Voice Portal menu.

The screenshot shows a web-based application interface for managing agents. At the top, there's a navigation bar with links for 'Campaigns', 'Reports', 'Administration', 'Data', and 'Help'. The 'Administration' dropdown is open, showing options like 'Today', 'MPR', 'ACD', 'SMS Compliance', 'Users', and 'Config'. The 'ACD' option is highlighted. Below the navigation is a search bar with a 'Search' button and a 'Refresh' button. The main content area is titled 'Day Campaigns' and 'LiveVox Voice Portal'. It displays a table of active agents with columns for 'Login ID', 'First Name', 'Last Name', 'Phone', 'Group', 'Head Agent', and 'Active'. There are five rows of data:

Login ID	First Name	Last Name	Phone	Group	Head Agent	Active
100	LIVEVOX	LIVEVOX	(732) 927-5411	-1	yes	yes
LV_JOS001	JOSE	BORUNA	(416) 814-9730	-1	yes	yes
LV_XPCH	LIVEVOX	LIVEVOX	(732) 927-5411	-1	yes	yes
LV_ISLAM	ZIAH	MUSSAAN	(650) 351-7541	-1	yes	yes

Below the table are navigation links: '<< first', '< prev', '1', 'next >', 'last >>'. A 'Edit' button is located at the bottom right of the table area.

- Options available on Active agents page:
 - Search – Allows to search for an agent by login ID.
 - Edit – Allows you to edit agent information (for details see section 3.2).
 - Refresh – Refreshes the list.

Related Topics[Agents List](#)Copyright (c) 2012 [LiveVox](#), All Rights Reserved.

3.1 Agents List - LiveVox Voice Portal

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AGENTS LIST

Related Topics

[Agent Setup](#)

[Active Agents](#)

[Inactive Agents](#)

[Locked Agents](#)

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AGENT SETUP

The following items are reviewed in this section:

- 3.1 Agents List**
 - 3.1.1 Active agents**
 - 3.1.2 Inactive agents**
 - 3.1.3 Locked agents**
- 3.2 Add (Set up an Agent)**
- 3.3 Mapping**
 - 3.3.1 By Agent (Agent vs. Skill Mapping)**
 - 3.3.2 By Skill (Skill vs. Agent Mapping)**
- 3.4 Export**
- 3.5 Import**
- 3.6 Agent Specific Routing**
- 3.7 Resource Grouping**
- 3.8 Agent Classification and routing of the calls**
- 3.9 DRG and Classification Call Routing Options**

Related Topics

- [Agents List](#)
- [Add \(Set up an Agent\)](#)
- [Mapping](#)
- [Export](#)
- [Import](#)
- [Agent Specific Routing](#)
- [Resource Grouping](#)
- [Agent Classification](#)
- [DRG and Classification Call Routing Options](#)

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5 Campaigns - LiveVox Voice Portal

Page 1 of 1

CAMPAIGNS

This section describes how to upload and build campaigns. A campaign is defined as a file which is loaded with a list of accounts to call. The following items are reviewed in this section:

- 5.1 Uploading a campaign
 - 5.1.1 Call List Shelf Life
- 5.2 Duplicate File Check
- 5.3 Assigning Campaign Dial Characteristics
- 5.4 Building a Campaign
- 5.5 Template manager and partitioning
 - 5.5.1 Creating a new template in Template Manager
- 5.6 Template Manager and Partitioning
 - 5.6.1 Creating a New Template in Template Manager
 - 5.6.2 Adding a New Partition to a Template
 - 5.6.3 Configuring Templates - Partition Mode
 - 5.6.4 Configuring Templates - Configure Mode
 - 5.6.5 Configuring Templates - Apply Mode
 - 5.6.6 Applying Templates in Campaign Manager
 - 5.6.7 Recurrence for Partitioned Campaigns

Related Topics

- [Uploading a Campaign](#)
- [Duplicate File Check](#)
- [Assigning Campaign Dial Characteristics](#)
- [Building a Campaign](#)
- [Requeuing a Campaign](#)
- [Template Manager and Partitioning](#)

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5.1.1 Call List Shelf Life - LiveVox Voice Portal

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CALL LIST SHELF LIFE

Shelf life defines the number of days the campaigns will be displayed in the Completed archive folder from the Campaign Manager window. Users may contact their account team or client-services@livevox.com to confirm or modify the timeframe setting for the files to be removed directly from the display in Campaign Manager to allow for easier viewing of only the most current files. A maximum system limitation of 30 days exists for the campaign shelf life. Data for reports exists on the LiveVox system beyond this limit. See the Reporting section for these date limitations.

Related Topics

[Uploading a Campaign](#)

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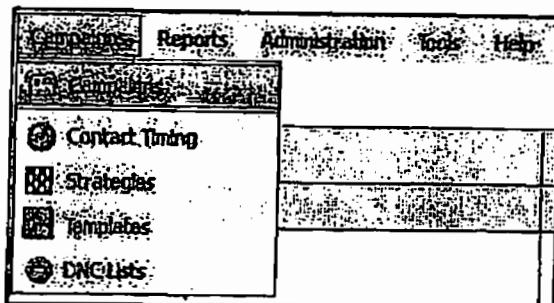
5.1 Uploading a Campaign - LiveVox Voice Portal

Page 1 of 3

UPLOADING A CAMPAIGN

This section describes how to upload a file containing phone numbers and customer information for use on the LiveVox system. Uploading a file will load a file onto a LiveVox. A file is not ready after it is uploaded – it must then be built in order to be ready to dial.

- **Navigate to the Campaign manager by selecting the 'Campaigns' link from the Campaigns drop down menu of the main Voice Portal menu.**



- You will be taken to the CM page. The following campaign categories and subcategories are available in Campaign Manager:

Category	Code	Date	Description	Source	Order	Priority	Comments
• Standard							
- Standard Standard	S-Std	-	Standard	SS-Std	23	On Demand	Standard
- Standard	S-Std	-	Standard Option	SS-Std	23	On Demand	
• Special							
- Standard Standard Special Options	S-Std	SI-Std - Standard Options	SS-Std	SI-Std	23	On Demand	Standard
- Standard Special Options	S-Std	SI-Std - Standard Options	SS-Std	SI-Std	23	On Demand	Standard
• Options							
- Standard Standard Options	S-Std	SI-Std - Standard Options	SS-Std	SI-Std	23	On Demand	Standard
- Standard Options	S-Std	SI-Std - Standard Options	SS-Std	SI-Std	23	On Demand	Standard
• Specials							

Uploads - Displays files that were uploaded for the current date but not assigned to a skill.

Archive - subcategory – files older than the current date are archived; these files will only be displayed until their shelf life expires.

Active - Displays files that have been uploaded and assigned to a skill. These files are available to be built and run. This is also where files uploaded via an FTP process but not assigned characteristics will be displayed. Files that are uploaded and processed by a Template partition will also appear here.

Recurring - Recurring campaigns are campaigns that are scheduled by the user to repeat on a predefined schedule. For example: A campaign set to dial each weekday, would be scheduled by selecting each day of the week, Monday through Friday and the specific dialing interval.

Completed - Displays files that have completed dialing and reported for the current date.

Archive - subcategory – Completed and reported files older than the current date are archived; these files will only be displayed until their shelf life expires.

5.1 Uploading a Campaign - LiveVox Voice Portal

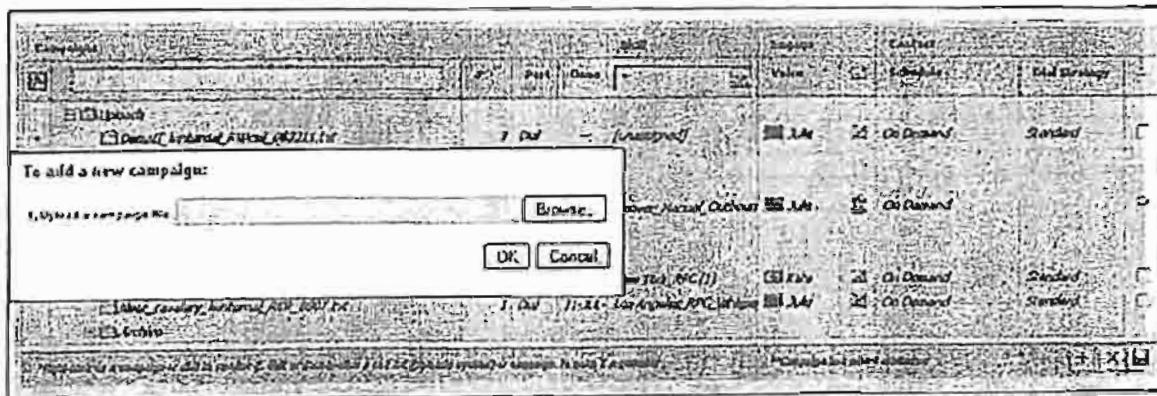
Page 2 of 3



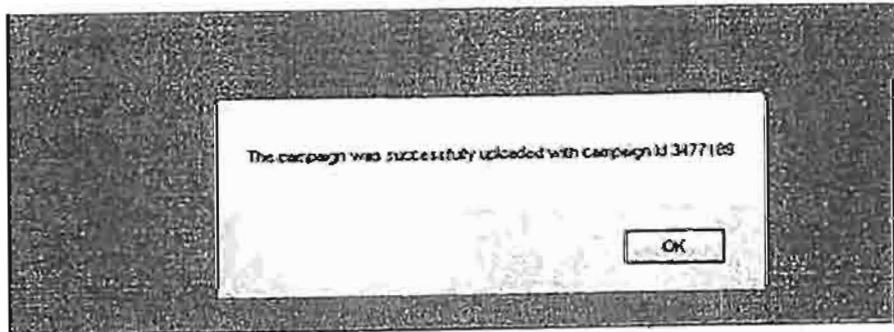
Archive folders are refreshed at midnight ET each night

To upload a file, follow the below steps:

- Click the add button in the lower-right corner of the campaign manager window. This will bring up a new window (next screen) asking for the file you want to upload:



- Click on the 'Browse' button to navigate to the directory that contains your upload file(s).
- Select the file you wish to upload (one at a time) by highlighting the file, and clicking 'Open', or by double-clicking on the filename.
- Choose 'OK' when done. A window will appear confirming the file has been uploaded successfully.

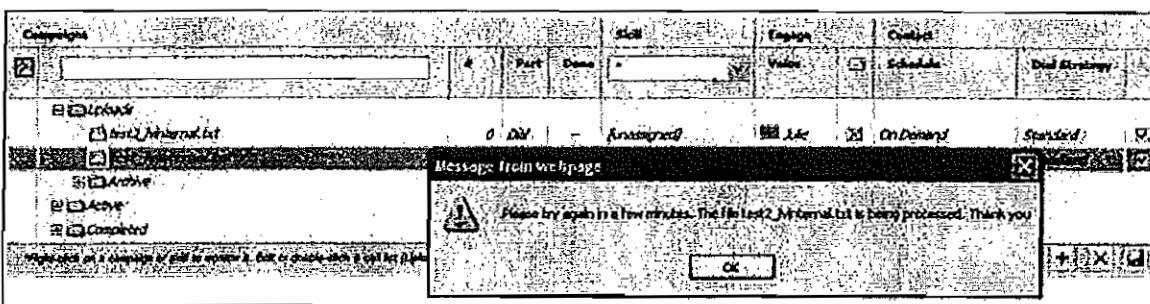


Campaigns should be submitted individually, not in batches. Please wait for confirmation before proceeding to assigning attributes to the next campaign. If you wish to load multiple files they can be sent via SFTP and processed automatically.

When uploading a new file, the campaign manager will check to see if the previous file has been fully processed. User will get an alert ("Please try again in a few minutes. The file FILENAME is being processed. Thank you") if the file has not been fully processed and a save has been attempted

5.1 Uploading a Campaign - LiveVox Voice Portal

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Related Topics

[Campaigns](#)
[Call List Shelf Life](#)

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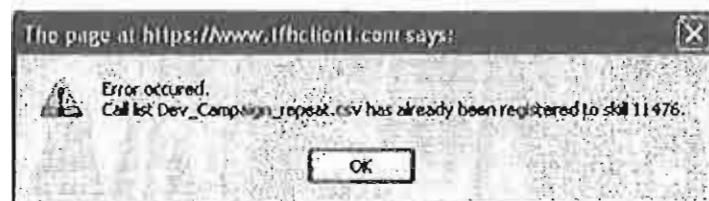
DUPLICATE FILE CHECK

Files loaded are checked against files already loaded to check if the name or content of any campaign files are duplicated.

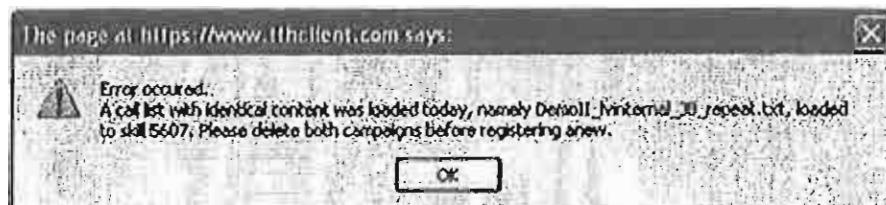
As a safeguard, LiveVox protects users against registering a campaign with the same name, to the same skill, or with exactly the same content/account information, as a campaign that has dialed or may be dialed within the same day.

Examples of error messages include the following:

- Duplicate by skill:



- Duplicate by content:



Related Topics

[Campaigns](#)

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5.3 Assigning Campaign Dial Characteristics - LiveVox Voice Portal

Page 1 of 6

ASSIGNING CAMPAIGN DIAL CHARACTERISTICS

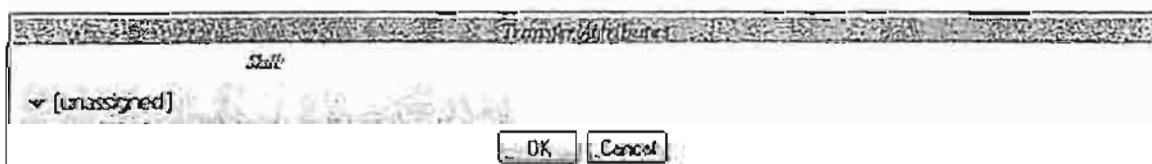
After a campaign has been uploaded but before it can be played, the dialing characteristics must be assigned. Instructions for setting which characteristics a campaign should use are explained in the below steps:

- Once files are uploaded, they will appear under the Uploads folder as seen on the screen shot below (unless a required template is applied to the uploaded file in which case it would move automatically to the Active folder).

File	Skill	Actions
Demo_AutoDial_00011.xls	Unassigned	
Demo_AutoDial_00012.xls	Standard	
Demo_AutoDial_00013.xls	Standard	
Demo_AutoDial_00014.xls	Standard	
Demo_AutoDial_00015.xls	Standard	

- Under the 'Skill' column, click on 'unassigned'.

This will open another window, seen below. Hovering over '[unassigned]' will display all call centers and skills under them. Pick the Call Center and skill into which you want to load a file / campaign.



5.3 Assigning Campaign Dial Characteristics - LiveVox Voice Portal

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- Callback phone can be typed in at this time. The callback phone is the number left on answering machine or live person messages by the LiveVox system.



Users can contact Livevox Support to add or modify the pre-defined caller ID phone numbers displayed by skill.

- To define the desired voice talent and messaging click on the available voice talent in the "Voice" column. The below features "Julie" as an example.

Campaign	Start Date	End Date	Skill	Language	Context	Old Category
RECRUIT	1/1/2013	1/31/2013	1. DFL	- (unassigned)	EN 24hr	On Demand Standard
RECRUIT	1/1/2013	1/31/2013	1. DFL	- Julie, Manual, English	EN 24hr	On Demand Standard
RECRUIT	1/1/2013	1/31/2013	1. DFL	- (unassigned)	EN 24hr	On Demand Standard
RECRUIT	1/1/2013	1/31/2013	1. DFL	- (unassigned)	EN 24hr	On Demand Standard

- Select the voice talent desired. The flag next to each voice talent indicates the language/ accent. The following is a list of possible voice talents:
 - o Julie - American Female
 - o Kate - British Female
 - o Bob - American Male
 - o Scarlet - American southern Female
 - o Juanita - Spanish Female
 - o Gisele - Portuguese Female
 - o Gruff M - American Male
 - o Gruff F - American Female
 - o Lee - American Male
 - o Claudine - French Canadian Female



Please note that NOT ALL voice talents are available for all clients. Please check with your LiveVox account team on what may be available to your company.

- Select your messaging options by clicking in the "Messaging" column.
 - o 'Leave a message on detected answering machines' – Detects answering machines and leaves a message
 - o 'Hang up on a detected answering machine' – if an answering machine is detected no message is left and the call is disconnected.

5.3 Assigning Campaign Dial Characteristics - LiveVox Voice Portal

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- o 'Transfer' all connections' → Answering machine detection is off. Passes all connections to agents.



The Messaging and Answering Machine options will reset to the new skill's default option whenever a new skill is selected.

Campaign	Slot	Engage	Contact	
E20000000000000000000000000000000	1 PW - Incoming	10:00 AM	On Demand	Standard
E20000000000000000000000000000000	Leave a message on detected answering machines			
E20000000000000000000000000000000	Hang up on detected answering machines			
E20000000000000000000000000000000	Transfer all connections		On Demand	
E20000000000000000000000000000000				
E20000000000000000000000000000000	2 Out 11:00 AM New York, NY (CST)	02 Rate	On Demand	Standard
E20000000000000000000000000000000	1 Out 11:00 AM Los Angeles, CA (where Pst Rate)	02 Rate	On Demand	Standard
E20000000000000000000000000000000				
E20000000000000000000000000000000				

- Once you have selected your 'Messaging' options, select your desired 'Schedule' settings. By default, all new campaigns are built 'On Demand' which means that the user determines when to begin dialing the campaigns. If you would like to schedule this campaign for some time in the future, click on 'On Demand' and then select 'Schedule a Run'. By default all campaigns end by 9 PM local time. The below screen will let you choose when this campaign will begin and end:

Applies to all campaigns derived from this call list

Dialing Days

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday
 Recur

Dialing Interval

Start:
 ASAP
 09 : 00
End:
 11 : 00
 End of Day

Times are EST

Cancel OK

5.3 Assigning Campaign Dial Characteristics - LiveVox Voice Portal

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Start = Time that this campaign will build and start dialing.

End = Time that this campaign will end

Days = Days that you want this campaign to run. These are all relative to the current moment in time, meaning that if today is Wednesday, and you want this campaign to run today, select Wednesday. If you want to schedule this campaign to run next Tuesday, select Tuesday. The system will know that you are requesting the next Tuesday available.

Recur = Select "Recur" if you want this campaign to repeat every week on the day(s) and time(s) specified. Recurring file settings that have previously been assigned can be edited from the Recurring subfolder within the Active folder in the Campaigns page.

Choose the "Recur" button and, after saving the campaign settings, uploading a file with the SAME NAME via FTP on subsequent days (with a check in the Dialing Days column) will automatically have the campaign settings/schedule applied. Note that a file loaded via the Voice Portal, or with a different name will not have the recurring campaign settings automatically assigned. Recurring campaigns must be uploaded prior to the scheduled start time.

ASAP = provides user the ability to start campaigns as soon as possible. It is an alternative to scheduling a specific start time.

End of Day = alternative to scheduling a specific end time. Selecting this option will result in no scheduled stop. The campaign will end by curfew, depletion or when a user presses stop in the campaign.



Scheduled campaign time frames use military/24 hour time and are based on the Eastern Time Zone.

- When done scheduling the campaign, press 'OK'. This will take you back to the campaigns screen.

- Select the appropriate dialing strategy by selecting the appropriately named strategy from the "Dialing Strategy" column. Reference section 6 of this document for detailed overview.
 - LiveVox can identify cell phones listed in a national cell phone database. Depending on whether or not the "Dial Cell Phones" box (the last option) has been selected LiveVox will or will not dial cell phones. The default for each client can be set so that it doesn't have to be changed every time (please contact LiveVox Support for more information).

5.3 Assigning Campaign Dial Characteristics - LiveVox Voice Portal

Page 6 of 6

- o By checking the Dial Cells box, identified cell phone numbers will be included in a dialing campaign.
- o Un-checking the Dial cells box will suppress all detected cell phone numbers from a dialing campaign.



To assist clients with wireless number dialing strategies, LiveVox uses a database of wireless numbers from Interactive Marketing Solutions (<http://www.ims-dm.com>). LiveVox is subscribed for the automated file delivery service from IMS for the following:

- *Wireless block identifier file (The list of area codes and exchanges or blocks of numbers assigned to wireless carriers active within the North American Numbering Plan in the US and Canada).*
 - Received from IMS monthly.
- *Ported number file (The list of numbers that appear to belong to wired land lines but are now assigned to wireless telephones and the list of numbers that appear to belong to wireless telephones but are now assigned to wired land lines.)*
 - Received from IMS daily.

For more information please refer to the FAQ's from Interactive Marketing Solutions:

http://www.ims-dm.com/products/WBI_FAQs.pdf

<http://www.ims-dm.com/products/PortedFAQs.pdf>

Please note that while IMS services are very accurate, LiveVox cannot guarantee 100% accuracy at all times, given the update intervals and other factors.

- Save changes when completed by selecting the save option in the right bottom corner of the Campaign Manager window.



If a file was mistakenly loaded, select the "Delete" field box and then save. The inappropriate file can be checked to delete permanently before submitting Campaign Builder requests.

Related Topics

[Campaigns](#)

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5.4 Building a Campaign - LiveVox Voice Portal

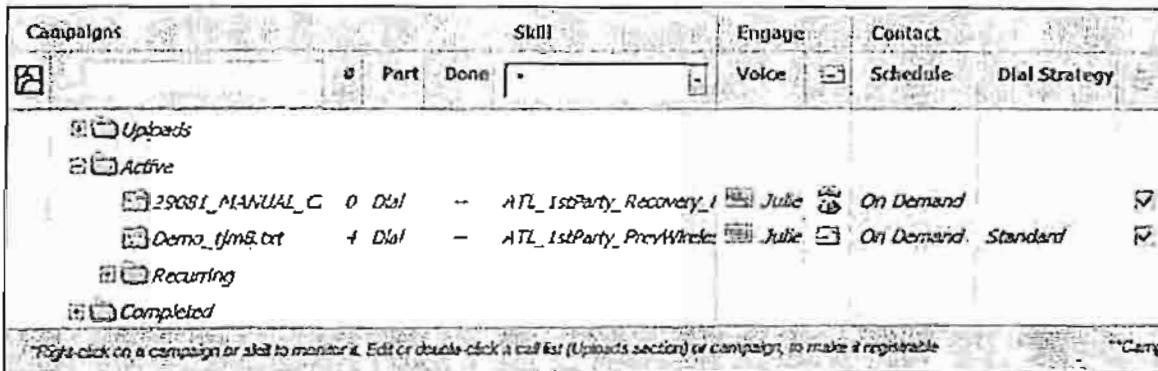
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BUILDING A CAMPAIGN

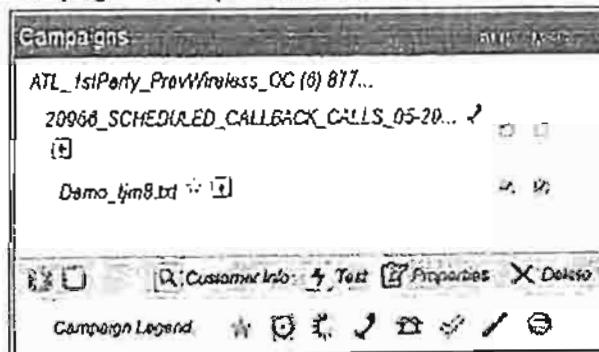
Building a campaign will take the file that was uploaded to the LiveVox server and load it into a table so that it is ready to be dialed. After the build process has completed, the campaign is ready for dialing.

To build a campaign that was set to run "On Demand", follow the below steps:

- Right-click on the campaign name of a file that has had all dial characteristics assigned and saved to open the Skill Page.



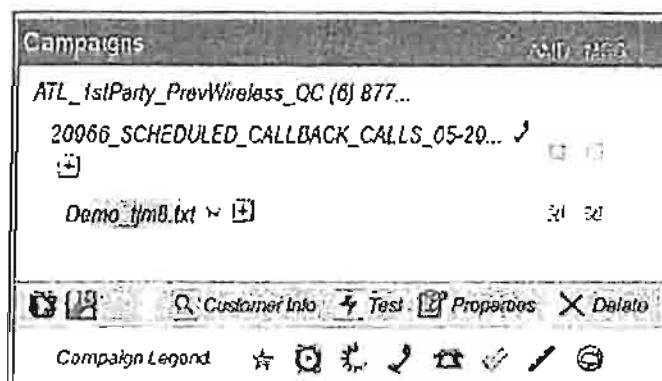
- On the skill page the campaign name will appear with a gray star (screen shot below), indicating the campaign has not yet been built and is not ready to dial.



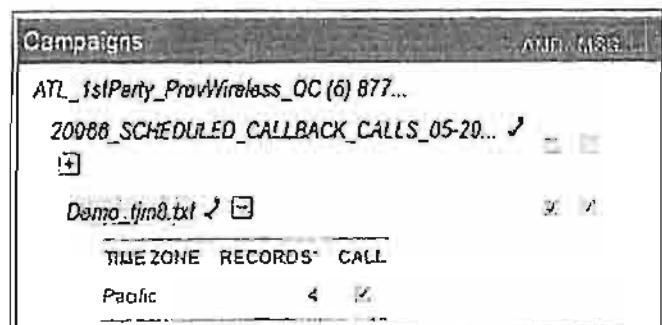
- Upon clicking on the campaign name the option to "Play" or "Prebuild" will become available. In either situation a spinning gray "Building" icon will appear while the build process is underway.
 - "Play" will build the campaign and, if agents are available and there are accounts allowed to dial based on your Dialing Profile, dialing will begin.
 - "Prebuild" will allow you to see how many accounts are available but will not start dialing until you select Play.

5.4 Building a Campaign - LiveVox Voice Portal

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- The campaign build process is completed when the spinning icon disappears. View accounts broken out by time zone by selecting the plus symbol next to the campaign name.



Related Topics

[Campaigns](#)

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5.5 Requeuing a Campaign - LiveVox Voice Portal

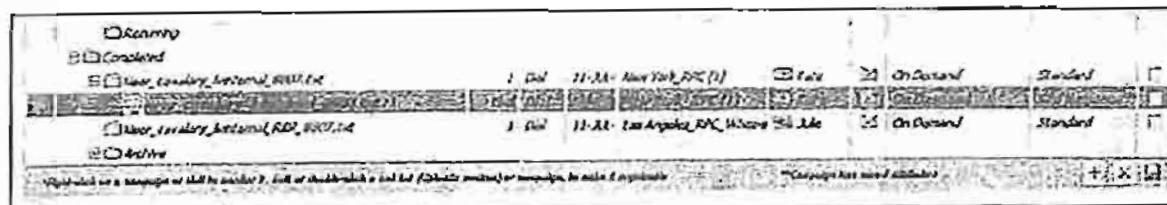
Page 1 of 2

REQUEUING A CAMPAIGN

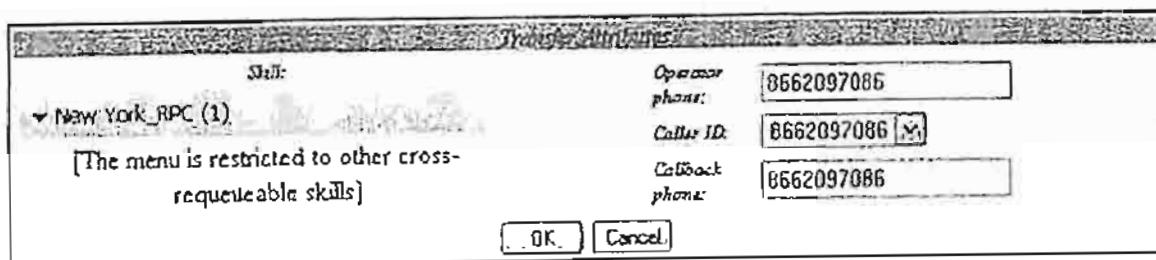
After a campaign has finished dialing or has been stopped manually, you may requeue the campaign to run certain results again, essentially providing the capability to make multiple passes on a single file without having to reload it.

Campaigns available for re-queuing will be listed under the '*Completed*' folder with a date in the 'Date Run' column as shown below or prior to the campaign running while in the *Uploads* folder.

- To requeue your file, highlight the file name and press the 'add' button in the lower right corner of the Campaign Manager window.
 - When you do this, the requeue file will appear immediately under the original file.



- You can requeue a campaign file on the same skill or across skills (Cross Skill requeue).
 - By default the skill assigned is the same as the skill the original campaign was assigned to.
 - Depending on skill settings, users may have the ability to requeue campaign on a different skill by selecting the skill that you wish to requeue to under the skill attribute column (screen shot below). This allows you to run on an RPC skill first, for example, and then requeue certain results to be run on a Quick Connect skill for the second pass.

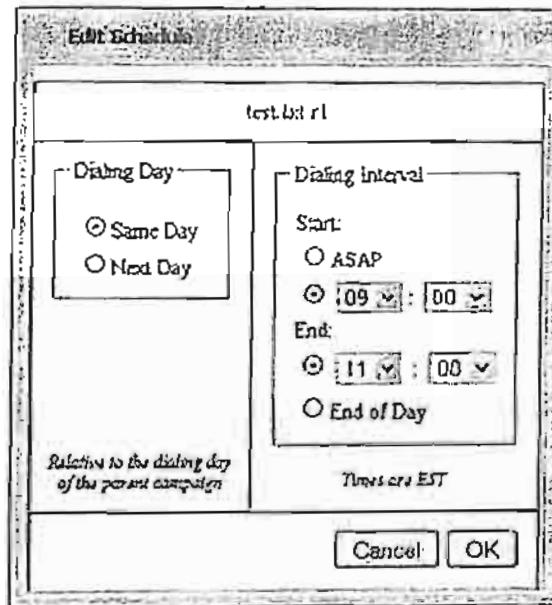


- You can only requeue within a set of skills in call center.
 - You cannot requeue on a skill that has custom (different input) logic.
 - Wireless numbers can be allowed or suppressed regardless of which wireless setting was assigned in the parent campaign.
 - At this point, you can also add or change the Messaging, Scheduling, or Dialing strategy options.
 - When scheduling requeue campaigns you can choose to run the campaign at a schedule you determine on either the same day as the original run or on the next day. Selecting "Schedule a Run" in the schedule tab displays the following overlay with user options for running a

5.5 Requesting a Campaign - LiveVox Voice Portal

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request campaign.



- Select the 'OK' button in the right bottom corner of the screen to save your changes.

Related Topics

[Campaigns](#)
[Campaign Request Tips](#)

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5.5.1 Campaign Requeue Tips - LiveVox Voice Portal

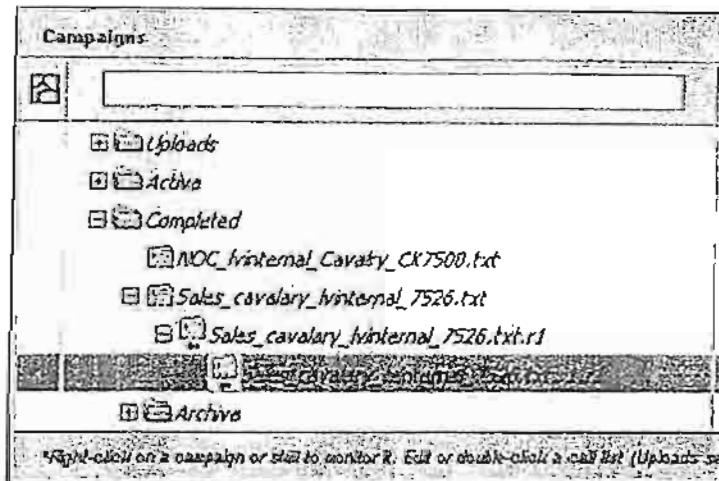
Page 1 of 2

CAMPAIGN REQUEUE TIPS

Be sure to setup your campaign requeues by only building requeue files from the previous campaign. Failing to do so may result in redialing an account that was previously an RPC or live party by taking into account that prior run's outcomes.

- Subsequently queued files are appended by a file extension of ".r1" representing each prior requeue. For example:
- Requeue of original file = .r1
- Requeue of first requeue (.r1) = .r1.r1
- Requeue of second requeue (.r1.r1) = .r1.r1.r1

The figure below shows a file which was setup correctly in that the requeue file always builds the list by the previous file's outcomes:



Not building a subsequent requeue off of the previous file's outcomes will append a sequential file extension such as .r2, .r3, etc.

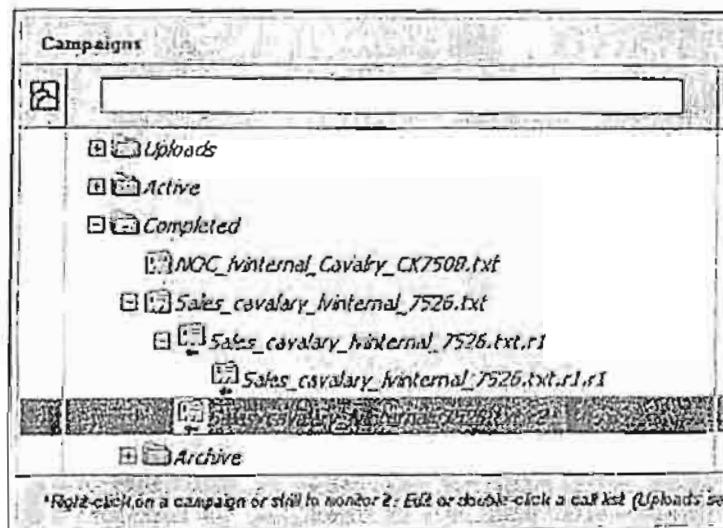
In this example below the original file was requeued in both a subsequent *and* a sequential manner:

- Requeue of original file = .r1
- Requeue of previous file = .r1.r1
- 2nd Requeue of original file = .r2

In this scenario a previously contacted account or phone number from the .r1 and .r1.r1 files may be dialed in the .r2 file, as the .r2 only considers outcomes from the original run.

5.5.1 Campaign Requeue Tips - LiveVox Voice Portal

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Related Topics

[Requeuing a Campaign](#)

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5.6 Template Manager and Partitioning - LiveVox Voice Portal

Page 1 of 1

TEMPLATE MANAGER AND PARTITIONING

The following sections describe the usage of Template Manager and how to split files.

Related Topics

[Campaigns](#)

[Creating a New Template in Template Manager](#)

[Adding a New Partition to a Template](#)

[Configuring Templates - Partition Mode](#)

[Configuring Templates - Configure Mode](#)

[Configuring Templates - Apply Mode](#)

[Applying Templates in Campaign Manager](#)

[Recurrence for Partitioned Campaigns](#)

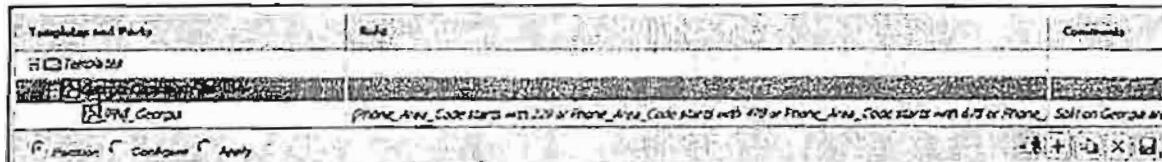
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5.6.1 Creating a New Template in Template Manager - LiveVox Voice Portal

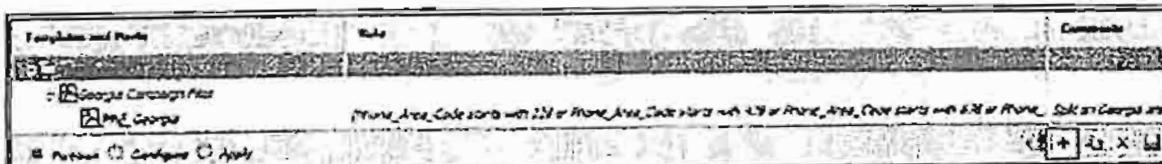
Page 1 of 1

CREATING A NEW TEMPLATE IN TEMPLATE MANAGER

The Template Manager allows users to define and maintain templates.



- **Templates** – Templates form the baseline allowing users to create partitions, parts, and rules
- A Template must be created in order to create a partition, which can then have parts and rules associated with that partition.
- Adding a new Template.
 - Select the '+' symbol (highlighted in Red)



- When the '+' is pressed, a new template will be added. Select the rename button (highlighted in Red) to rename the new Template as something which reflects the function of the new template (Example illustrates a template which splits a file based on Georgia Area Codes)

**Related Topics**

[Template Manager and Partitioning](#)

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5.6.2 Adding a New Partition to a Template - LiveVox Voice Portal

Page 1 of 1

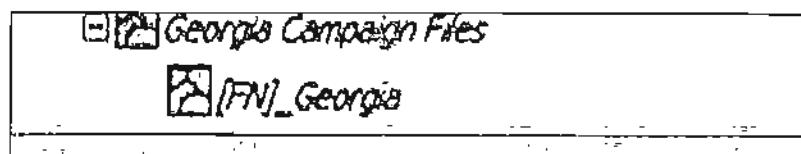
ADDING A NEW PARTITION TO A TEMPLATE

Once the template has been created, in order to begin setting up rules to split a file, a partition must be created.

- A *partition* is a set of grouping rules, attached to a template.
 - A *part* is a subset of a partition. Multiple *parts* can make up a partition.
 - If the *part* determines a sub campaign, the name of the sub campaign can have a naming convention, with supported variables, as defined below.
 - The following variables are supported:
 - [FN] = filename without extension
 - [EXT] = filename extension (ex:.txt)
 - [YYYY] – 4 digit year
 - [YY] – 2 digit year
 - [MM] – 2 digit month
 - [DD] – 2 digit day
- How to add a new Partition to a Template.
 - Highlight the new template that was created and press the '+' button in order to create a partition.



- Rename the new partition using supported variables (discussed above). The below screen shot illustrates a partition which is named using [FN] variable (filename without extension).



If you uploaded and partitioned file named Campaign_1.txt, the resulting sub campaign filename would be Campaign_1_Georgia.txt

Related Topics

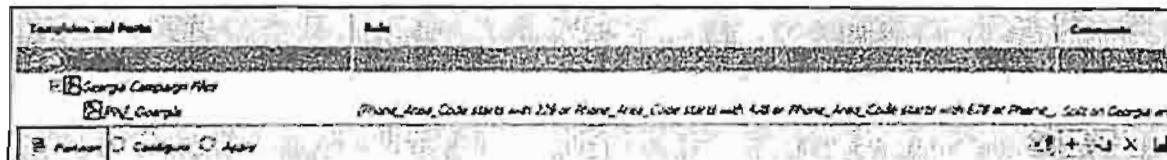
[Template Manager and Partitioning](#)

5.6.3 Configuring Templates - Partition Mode - LiveVox Voice Portal

Page 1 of 3

CONFIGURING TEMPLATES - PARTITION MODE

Created partitions can be managed using Partition Mode. Partition Mode allows users to add rules to the previously defined partitions:



When this mode is selected users can configure the rules used to split a campaign file. These rules are known as **Grouping Rules**. The example below illustrates a template with rules set to split a file based on area code:

This rule defines Part "770_Georgia" of Template "Georgia Campaign Files"

(Phone_Area_Code starts with 225 or Phone_Area_Code starts with 404 or Phone_Area_Code starts with 877
or Phone_Area_Code starts with 770 or Phone_Area_Code starts with 704 or Phone_Area_Code starts with 678
or Phone_Area_Code starts with 424) v

- Phone_Area_Code starts with 225
- Phone_Area_Code starts with 404
- Phone_Area_Code starts with 877
- Phone_Area_Code starts with 770
- Phone_Area_Code starts with 704
- Phone_Area_Code starts with 678
- Phone_Area_Code starts with 424

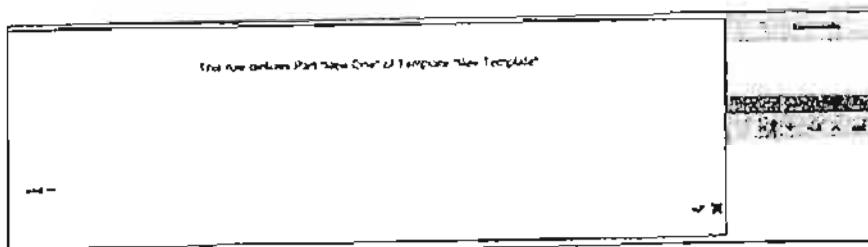
v \$2

- Each individual line displayed above is also known as a simple grouping rule.
- A condition used for the rule is based on a value provided in the input file
- All simple rules combined make a complex grouping rule.

How to add a grouping rule to a partitioning template part

Adding a simple grouping rule:

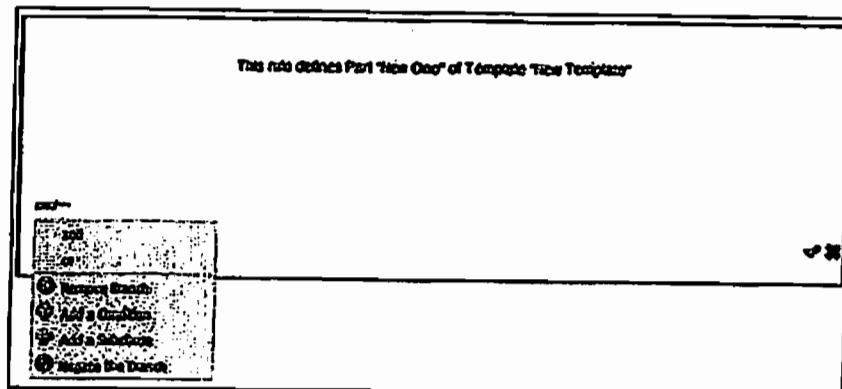
- Click on the area below the 'Rule' section to bring up the condition editor



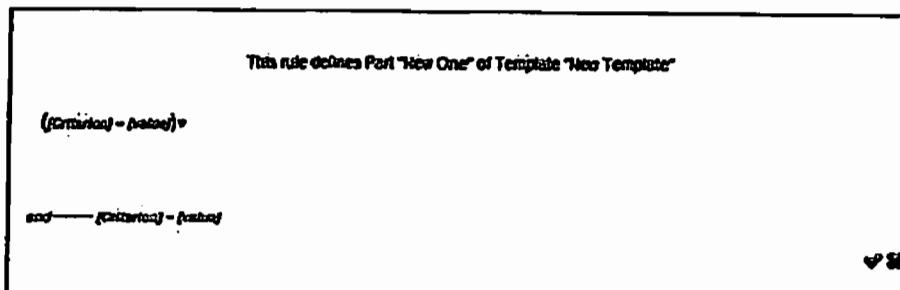
- Click over the 'And' Condition in order to bring up the various options for part rules.

5.6.3 Configuring Templates - Partition Mode - LiveVox Voice Portal

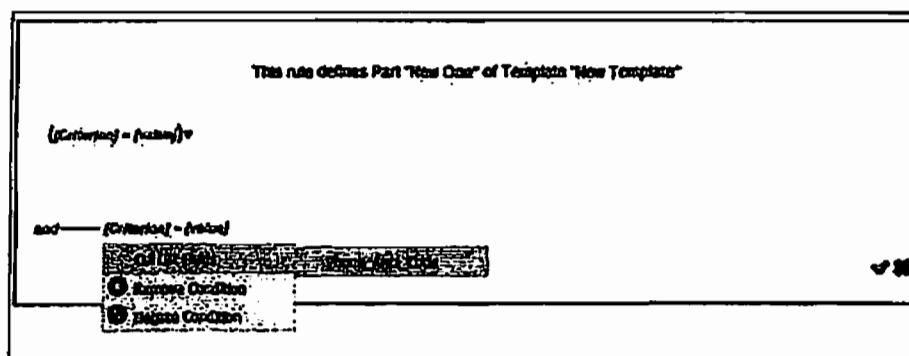
Page 2 of 3



- Click on "Add a Condition" in order to add a single grouping rule to the part.



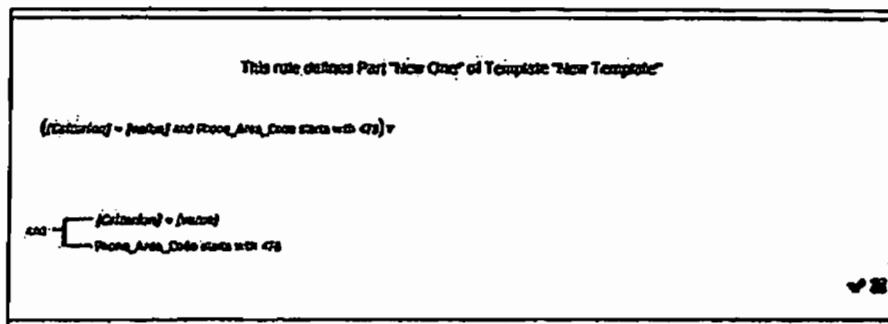
- Criterion and Value selections are predefined during setup process. Please let the LiveVox team know what criteria you plan using for splitting files. If additional values need to be added at a later date, please contact LiveVox Support.
 - This example uses Phone_Area_Code as predefined Criterion.



- Final step is to select the value, for example, area code 229.
- A complex grouping rule can be applied by adding more conditions to the rule 2, different operators are used to link grouping rules:
 - AND requires that all conditions linked with AND are fulfilled.
 - OR requires that at least 1 condition linked with OR is fulfilled.

5.6.3 Configuring Templates - Partition Mode - LiveVox Voice Portal

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Related Topics

[Template Manager and Partitioning](#)

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5.6.4 Configuring Templates - Configure Mode - LiveVox Voice Portal

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CONFIGURING TEMPLATES - CONFIGURE MODE

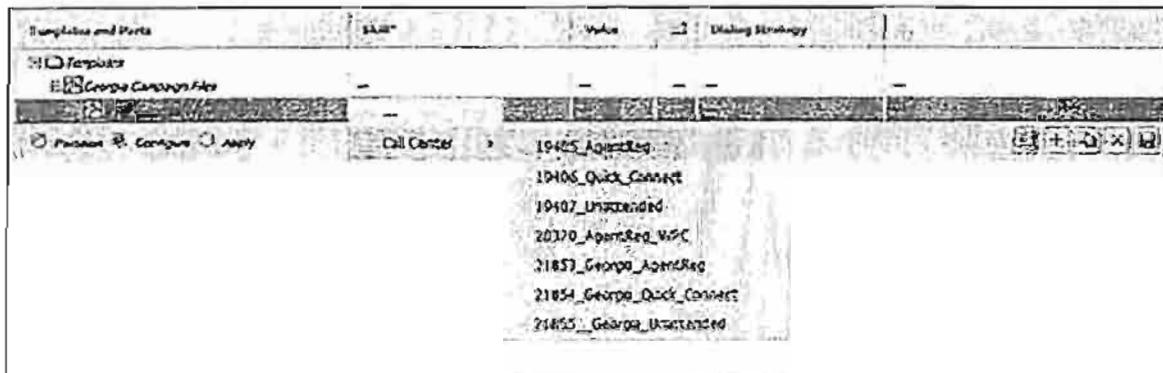
Once rules have been defined, Configure Mode is used to assign specific campaign attributes to the sub campaigns generated by their partitions.

- This mode is similar to the Campaign Manager – skills, voice talent, messaging options, dialing strategy, and dial cell phone options are all available here and are *configured in the same manner as in Campaign Manager*
- This mode allows users to assign attributes to an entire campaign as well as to the partitioned sub campaigns

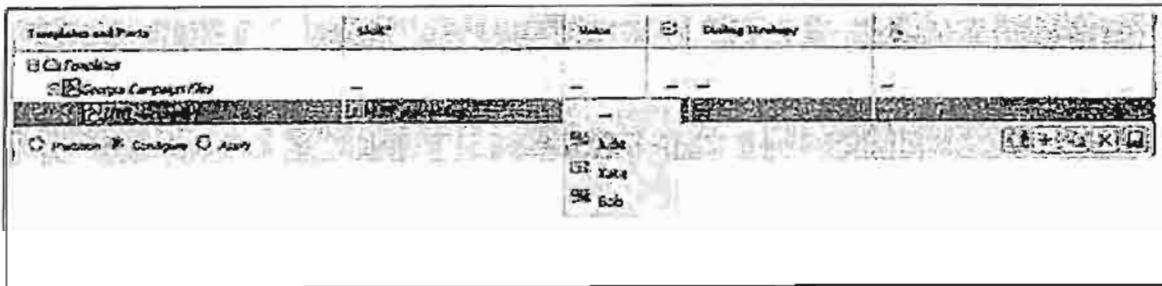


Users may select the following attributes for the specific Configuration Template:

- Skill



- Voice talent



- Message option

5.6.4 Configuring Templates - Configure Mode - LiveVox Voice Portal

Page 2 of 2

Dialing Strategy

- Leave a message on detected answering machines
- Hang up on detected answering machines
- Transfer all connections

- Dialing strategy

Dial Cells

- POE Only
- POE Required
- SP Test
- Standard
- Std Required

- Dial cells

Dial Cells

- Dial Cells
- Don't dial cells



- dash in the drop down value means no configuration has been defined.

Related Topics

[Template Manager and Partitioning](#)

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5.6.5 Configuring Templates - Apply Mode - LiveVox Voice Portal

Page 1 of 2

CONFIGURING TEMPLATES - APPLY MODE

Finally, Apply mode, is used to set specific dispositions, or behaviors, for partitions in a template. This allows a single campaign and its sub campaigns to vary depending on how a user has defined their templates.

In Template Manager, users may indicate the settings of parts within a dialing campaign. The optional modes are:

- **Dial:** default mode for original and requeue campaign.
- **Exclude:** This will exclude any record contained in that part or the main campaign.
- **Split:** Only available to parts in the upload section. A separate campaign is created from the campaign records
- **Join:** Only available to partitions in the Campaign Manager. Joins partitioned campaigns into a single campaign

Template and Part	Disposition	Require	Filename Format	Protected	Locked
2010-01-01					
PM George	SOS				
Person	Callout	Yes			

Users may select "Require" if the user desires the template to be automatically applied. Automatically applied template is also referred to as a required template. By selecting the check box, the template will be automatically applied upon upload to any Campaign file that matches the filename format defined under the Filename Format column. The filename formatting follows standard command prompt guidelines, with a star symbol (*) acting as a wildcard. The Campaign File is automatically registered and appears directly in the "Active" section of Campaigns

All campaign options (Skill, Voice Talent, Messaging Option, Schedule, Dialing Strategy, Cell phones) are now available and can be configured from the Active Section.

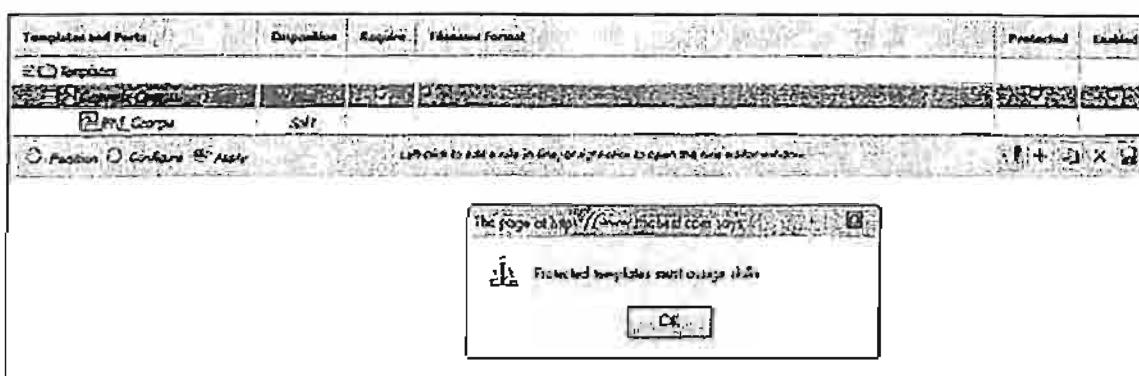


Only a Superuser can create and maintain a required template. Any user with prepare power (e.g. a Manager) may create and maintain an optional template.

User may select the "Protected" checkbox to lock non-manager level and users and above from modifying attributes for a template in the template manager. Skill attributes are pre-configured as described in section 5.6.4. "Protected" can only be selected if the template has skills assigned for each Part associated. Users will get the following warning if any skill is not assigned.

5.6.5 Configuring Templates - Apply Mode - LiveVox Voice Portal

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Related Topics

[Template Manager and Partitioning](#)

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5.6.6 Applying Templates in Campaign Manager - LiveVox Voice Portal

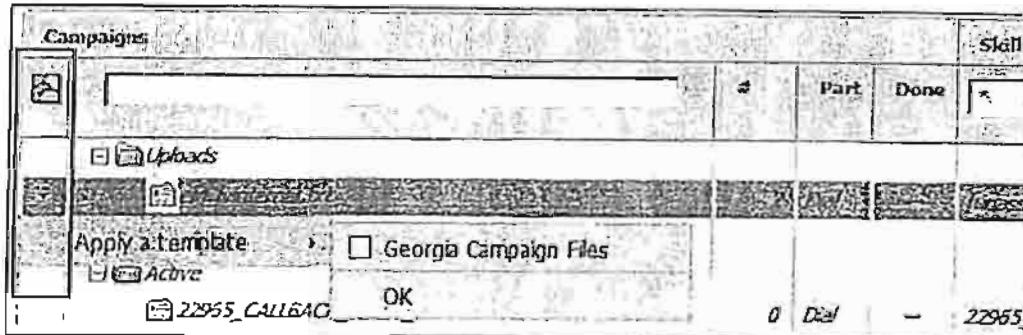
Page 1 of 2

APPLYING TEMPLATES IN CAMPAIGN MANAGER

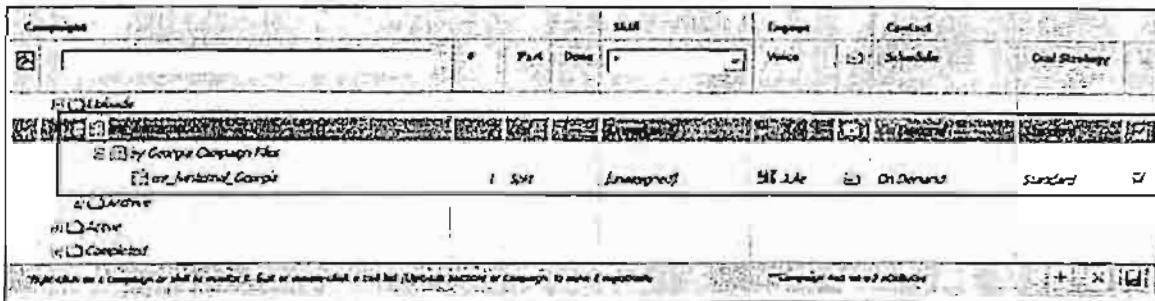
Although templates can be automatically applied to campaigns through the rules defined in Template Manager ~ Apply Mode, templates can also be applied in Campaign Manager if the template is not "Required."

Tutorial: Applying Templates in Campaign Manager

- When uploading a new file user may select a template to apply by clicking on the left most column arrow.



- Upon selecting the template by clicking on the empty box and pressing OK, user will be able to run the partitioned campaign files.



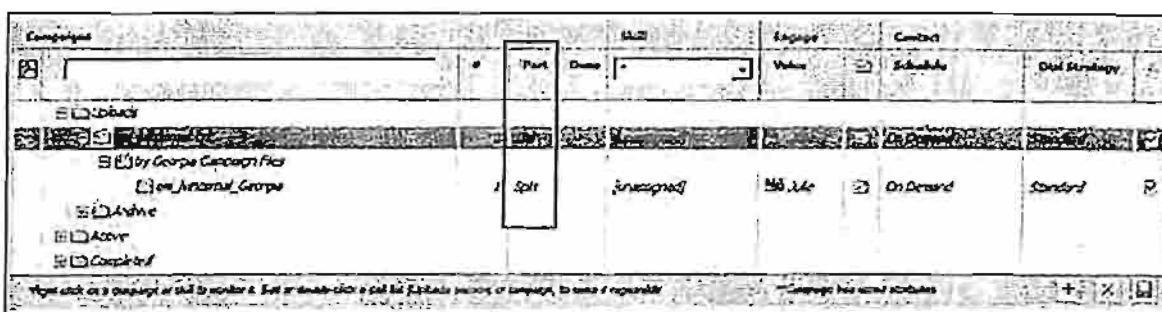
When a file has been partitioned, the sub campaigns can have queues be set by selecting the '+' button.

As described in section 5.6.5 – *Configuring Templates – Apply Mode*, campaigns can be pre-configured to be split, joined, dialed, or excluded.

- It is also possible to change the pre-configuration disposition of these sub campaigns after applying a template by clicking in the Part column and selecting either *split*, *join*, *dial*, or *exclude*.
- After registration of a campaign, users can choose to exclude any sub campaign from dialing, in which case it will not appear on any monitoring pages.

5.6.6 Applying Templates in Campaign Manager - LiveVox Voice Portal

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Related Topics

[Template Manager and Partitioning](#)

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5.6.7 Recurrence for Partitioned Campaigns - LiveVox Voice Portal

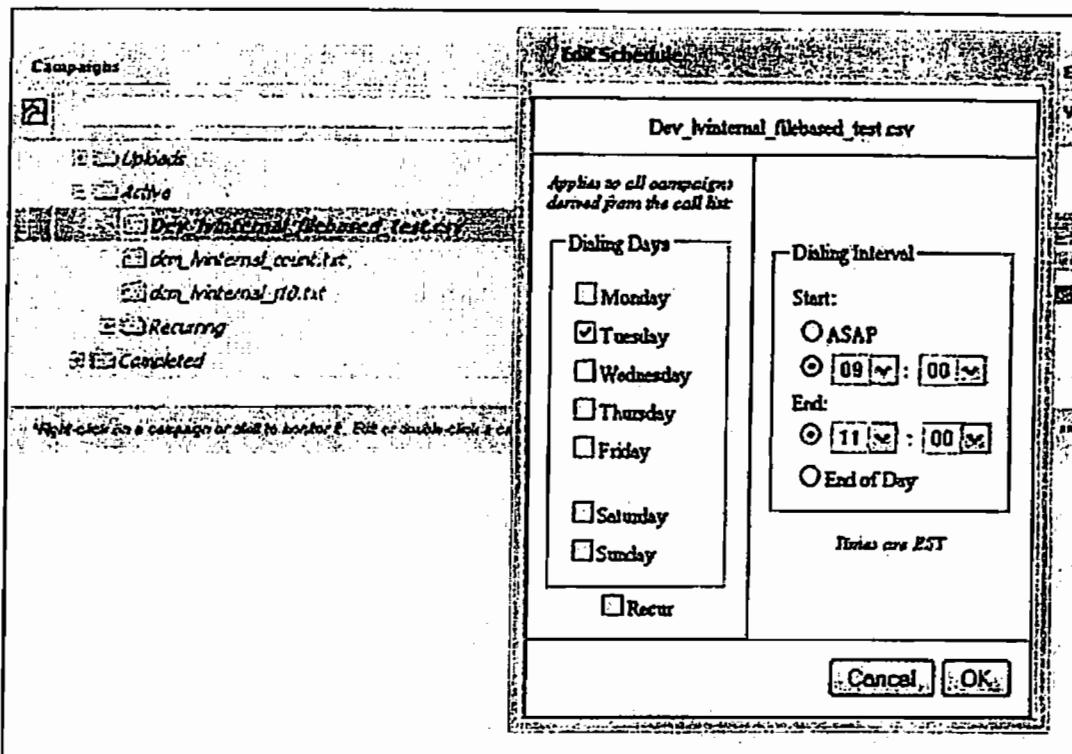
Page 1 of 3

RECURRENCE FOR PARTITIONED CAMPAIGNS

Users may now select recurrence options for campaigns and partitioned campaigns uploaded into Campaign Manager.

- There are several principles for list-level scheduling:
 - Dial entire campaign file on any given day.
 - Individual sub campaigns may be scheduled to dial at different times.
 - On-demand campaigns and their sub campaigns are all dialed on-demand on the day the original campaign is uploaded and built.
 - Requeues are an exception to this rule – requeues can always be on-demand, scheduled, on any given day after the original file has been uploaded and run.

Illustrated below is the Scheduling Configuration tool, which is accessed in Campaign Manager.



- Dialing Day is configured on the left side. Dialing Interval (or time) is configured on the right side
 - Selecting "Recur" will launch files of the same given campaign name on the scheduled time and date.
 - Recurring campaigns must be uploaded prior to the first scheduled start time across all parts.
- The dialing days are only shown in the scheduling form of the original campaign
- As a convenience, system allows the user to specify the dialing days for the call list when editing a part schedule, but user is warned of the global application of the specification.

5.6.7 Recurrence for Partitioned Campaigns - LiveVox Voice Portal

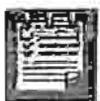
Page 2 of 3



It is not suggested that you modify templates while a recurring campaign is in effect

How to create a recurring campaign with a template

- Create a partitioning template
- Ensure that all parts are configured with the correct skill and other attributes.
- Upload a test file and let it be split.
- Set the mother campaign with a recurring schedule.
- Adjust the part schedules as needed.
- Define the recurring schedule for the master file (Important: file name should match exactly the name of the file that is being sent. Filename needs to be the same everyday for recurring campaigns).
- Let the first day instance run.
- Recurring campaigns should be uploaded through _SFTP.
- Note that a file loaded via the Voice Portal, or with a different name, will not have the recurring campaign settings automatically assigned.



When setting up schedules please take into account the time required to split the file.

Ensure that there is a 10 minute buffer between upload time and scheduled time. For example, don't set the schedules to 8 am if the file is being sent at 8:10 am.

5.6.7 Recurrence for Partitioned Campaigns - LiveVox Voice Portal

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Related Topics

[Template Manager and Partitioning](#)

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CREATING DIALING STRATEGIES

This section covers the Strategies Manager and describes how to create a new dialing strategy or make changes to a previously defined dialing strategy. The following items are reviewed in this section:

- 6.1 Strategies Manager
- 6.2 Creating a New Dialing Strategy for a Campaign

Related Topics

- [Strategies Manager](#)
- [Creating a New Dialing Strategy for a Campaign](#)

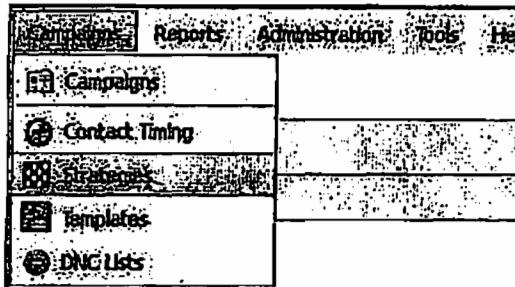
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6.1 Strategies Manager - LiveVox Voice Portal

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STRATEGIES MANAGER

- Navigate to the Strategies Manager by selecting the 'Strategies' link from the Campaigns drop down menu from the main Voice Portal menu.



- User will be taken to the Strategies page. From here users are allowed to configure multiple options for different call strategies and outcomes.



- Available call strategy functions are displayed with their column names below:

Strategy/Outcome	Dialing Strategy	Description	Actions
Standard	Sequential	Sequential dialing	New Edit Delete Import
Random	Random	Random dialing	New Edit Delete Import
Round Robin	Round Robin	Round robin dialing	New Edit Delete Import
Round Robin Random	Round Robin Random	Round robin random dialing	New Edit Delete Import

The **Strategy/Outcome** column is the unique name for each individual dialing strategy. You can use one of the standard strategies pre-built on your Livevox Voice Portal, or you can create one of your own.

By default, the Dialing Strategy selected for Campaigns is "Standard" and is defined as dialing sequentially each phone (Phone 1, Phone 2, Phone 3, and so on) that is contained in the input file provided by the client.

6.1 Strategies Manager - LiveVox Voice Portal

Page 2 of 4

Barcode/Outcomes	Dial Number Number	Try Another Round of Dialing	Response
	Interval	#	
<input checked="" type="checkbox"/> Miscellaneous			
<input checked="" type="checkbox"/> No Connection			
<input checked="" type="checkbox"/> Not Mode			
<input checked="" type="checkbox"/> Operator Transfer			
<input checked="" type="checkbox"/> 911			
<input checked="" type="checkbox"/> DDD - All Phone Types			
<input checked="" type="checkbox"/> Customer Hangup			
<input checked="" type="checkbox"/> Busy			
<input checked="" type="checkbox"/> Hung Up At Opening			
<input checked="" type="checkbox"/> Start Recording			
<input checked="" type="checkbox"/> Live Waiting Line			

The 'Dial another Number' option is a setting (check box) that determines if the next number in the dialing sequence associated with an account should be dialed if the current call results in the associated outcome. For example in the below image if the first call (set to phone 1) results in a "Busy" outcome the system will attempt to dial the next phone number (set to phone 2) associated with the account.

The 'Try another Round of Dialing' option consists of two settings:

- 'Interval' determines the time between dialing rounds. This is set in minutes. System will wait this interval before launching another call if # is set to more than 0.
 - Default setting is 10.
 - '#' determines the number of re-dialing attempts and is defaulted to 0.
 - For example, as seen in the image below, if Call 1 results in a Busy signal the system attempts another round of dialing after a 10 minute wait. If a Busy signal is reached again the system attempts the next associated number due to the "Dial another Number" option being checked.

6.1 Strategies Manager - LiveVox Voice Portal

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Strategy/Outcome	Dial Another Number	Try Another Round of Dialing	Responses			
<input checked="" type="checkbox"/> Customer Response						
<input checked="" type="checkbox"/> DIAVOX - All Phone Types						
<input checked="" type="checkbox"/> Customer Hang Up	<input type="checkbox"/>	10 minutes	<input type="checkbox"/>			
<input checked="" type="checkbox"/> Left Message	<input type="checkbox"/>	10 minutes	<input type="checkbox"/>			
<input checked="" type="checkbox"/> No Answer	<input type="checkbox"/>	10 minutes	<input type="checkbox"/>			
<input checked="" type="checkbox"/> Stop Hangup						
<input checked="" type="checkbox"/> No Connection						
<input checked="" type="checkbox"/> Invalid Phone Number	<input type="checkbox"/>	10 minutes	<input type="checkbox"/>			
<input checked="" type="checkbox"/> No Answer	<input type="checkbox"/>	10 minutes	<input type="checkbox"/>			
<input checked="" type="checkbox"/> Stop Hangup						
<input checked="" type="checkbox"/> Operator Transfer						
<input checked="" type="checkbox"/> Stop						
<input checked="" type="checkbox"/> DIAVOX - Cell Phone Only						
<input checked="" type="checkbox"/> DIAVOX - Landline Only						
<input checked="" type="checkbox"/> Operator Only						
<input checked="" type="checkbox"/> DIAVOX Only						
<input checked="" type="checkbox"/> Standard						
<input checked="" type="checkbox"/> Std/Feature						
Call 1 → Phone 1	Call 2 → Phone 2	Call 3 → Phone 3	Call 4 → Phone 4	Call 5 → Phone 5	10 min	



Dialing Round is an attempt to reach the customer by dialing a sequence of phone numbers with a defined delay between call attempts.

The "Requeue" option is a setting (check box) that determines which outcomes to requeue when the strategy is applied to additional passes on a campaign.

When "Requeue" is checked, the system will add accounts to a requeue campaign for which this was the best outcome of the parent campaign.

- The Requeue option is unselected by default

The example below illustrates the outcomes that the user may configure for requeued campaigns.

Strategy/Outcome	Dial Another Number	Try Another Round of Dialing	Responses			
<input checked="" type="checkbox"/> Customer Response						
<input checked="" type="checkbox"/> DIAVOX						
<input checked="" type="checkbox"/> Customer Hang Up	<input type="checkbox"/>	10 minutes	<input type="checkbox"/>			
<input checked="" type="checkbox"/> Left Message	<input type="checkbox"/>	10 minutes	<input type="checkbox"/>			
<input checked="" type="checkbox"/> Customer Not Available	<input type="checkbox"/>	10 minutes	<input type="checkbox"/>			
<input checked="" type="checkbox"/> Right Party listened to Message	<input type="checkbox"/>	10 minutes	<input type="checkbox"/>			
<input checked="" type="checkbox"/> Spouse listened to Message	<input type="checkbox"/>	10 minutes	<input type="checkbox"/>			
<input checked="" type="checkbox"/> Stop Hangup						
<input checked="" type="checkbox"/> No Connection						
<input checked="" type="checkbox"/> Stop Hangup						
<input checked="" type="checkbox"/> Stop						
<input checked="" type="checkbox"/> Operator Transfer						
<input checked="" type="checkbox"/> Stop						
<input checked="" type="checkbox"/> DIAVOX Only						
<input checked="" type="checkbox"/> Standard						
<input checked="" type="checkbox"/> Std/Feature						
Call 1 → Phone 1	Call 2 → Phone 2	Call 3 → Phone 3	Call 4 → Phone 4	Call 5 → Phone 5	10 min	

6.1 Strategies Manager - LiveVox Voice Portal

Page 4 of 4

Each unique strategy can be used for the initial pass on a file. Only strategies with at least one selected Requeue result can be used on the subsequent requeue files that are generated. For a multipurpose strategy (both Original and Requeue) the user may select the appropriate phone fields and arrange them into the order they should be dialed. A multipurpose strategy should also have the appropriate call outcomes that will be redialed on any subsequent pass. The selected Requeue outcomes will only apply to a requeue pass and will not affect the initial pass of a dialing campaign.

Additional options available in the Strategy Manager footer:

-  Rename the selected strategy
-  Add a new strategy
-  Copy the selected strategy
-  Delete the selected strategy
-  Save adjusted settings
-  Length of the dialing sequence

The length of the dialing sequence can be configured to allow for up to 30 phones.



Related Topics

[Creating Dialing Strategies](#)

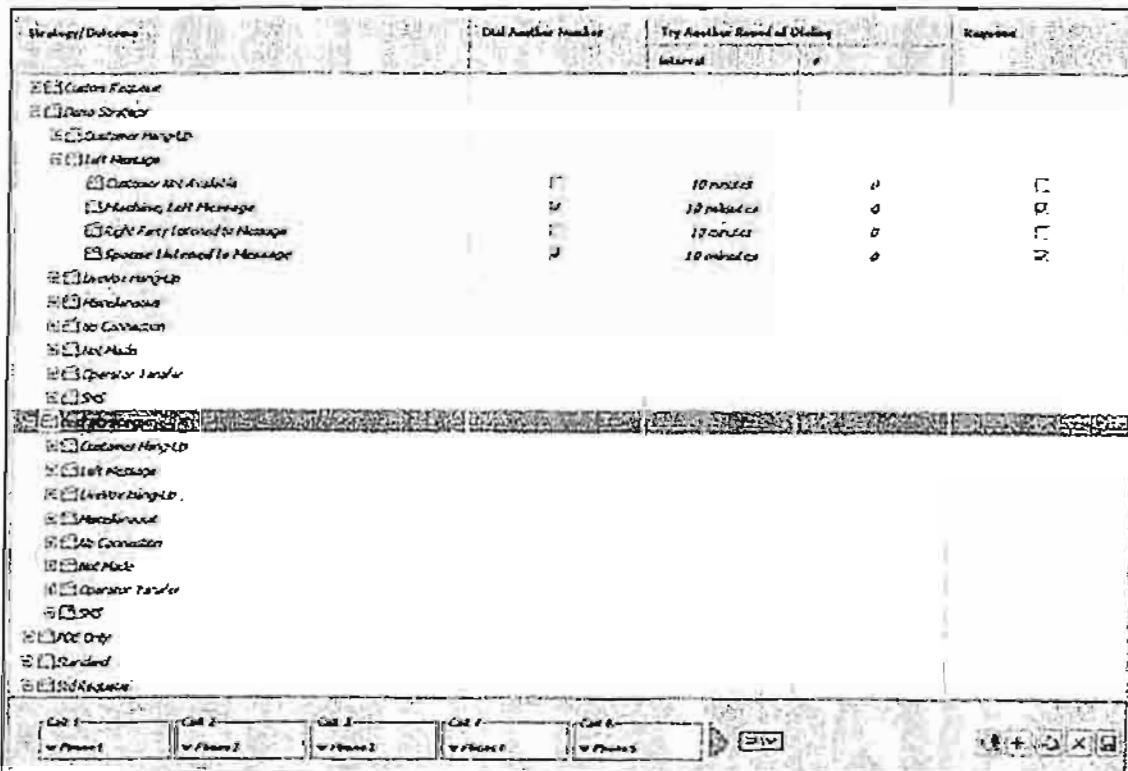
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6.2 Creating a New Dialing Strategy for a Campaign - LiveVox Voice Portal

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CREATING A NEW DIALING STRATEGY FOR A CAMPAIGN

- To create a new dialing strategy, select the 'Add' button from the menu tool bar at the lower right corner of the Strategies window.
- You will receive a 'Rename Strategy' pop-up box to select the name for your new strategy. Be sure to use only Alpha numeric characters in the new strategy name. Symbols such as apostrophes and underscores are not allowed. Select 'OK' to save your new strategy name. Select Cancel to exit the new strategy creation.
- Once a new name has been selected and saved by pressing the OK button, your new strategy will appear within the Strategies window.



- The new strategy can now be modified to take the appropriate actions for each specific outcome.

6.2 Creating a New Dialing Strategy for a Campaign - LiveVox Voice Portal

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Related Topics

[Creating Dialing Strategies](#)

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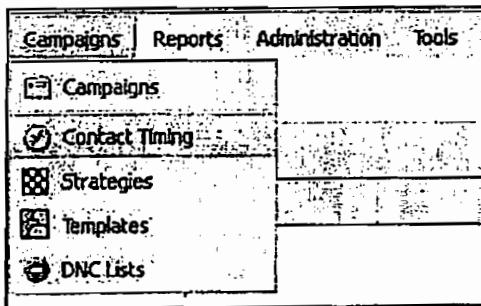
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CONTACT TIMING

This section covers how to prioritize the dialing of campaigns by identifying accounts that fall into 'prime time' windows by Time Zone and applying higher dialing priorities to those accounts while they are in "prime time". The following items are reviewed in this section:

- 7.1 Curfew Only
- 7.2 Contact Timing Strategy
 - 7.2.1 Prioritized Dialing
 - 7.2.2 Restricted Dialing

- Navigate to the Contact Timing UI by selecting the 'Contact Timing' link from the Campaigns drop down menu from the main Voice Portal menu.



Related Topics

- [Curfew Only](#)
- [Contact Timing Strategy](#)

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1 Introduction - LiveVox Voice Portal

Page 1 of 2

INTRODUCTION

This User Guide is designed to provide the basic guidelines to navigate the LiveVox voice portal in the most efficient and effective manner.

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1 Introduction - LiveVox Voice Portal

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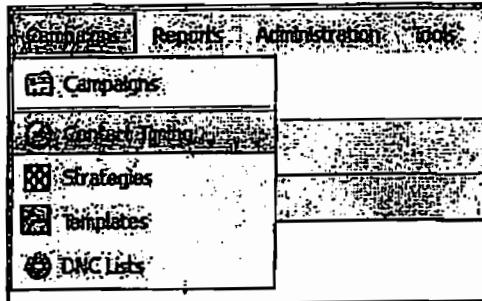
PA72

CONTACT TIMING

This section covers how to prioritize the dialing of campaigns by identifying accounts that fall into 'prime time' windows by Time Zone and applying higher dialling priorities to those accounts while they are in "prime time". The following items are reviewed in this section:

- 7.1 Curfew Only
- 7.2 Contact Timing Strategy
 - 7.2.1 Prioritized Dialing
 - 7.2.2 Restricted Dialing

- Navigate to the Contact Timing UI by selecting the 'Contact Timing' link from the Campaigns drop down menu from the main Voice Portal menu.



Related Topics

- [Curfew Only](#)
- [Contact Timing Strategy](#)

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7.2 Contact Timing Strategy - LiveVox Voice Portal

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CONTACT TIMING STRATEGY

The Contact Timing strategy allows you to maximize your dialing efforts by calling each account during self-defined "Prime Time" windows. The user defines, for each skill, which hours of the day are considered "Prime Time" hours. The user has the ability to define weekday and weekend prime time hours for both the morning and the evening.

There are two separate options under Contact Timing: Prioritized Dialing and Restricted Dialing.

Related Topics

[Contact Timing](#)

[Prioritized Dialing](#)

[Restricted Dialing](#)

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7.2.1 Prioritized Dialing - LiveVox Voice Portal

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PRIORITIZED DIALING

When using the Prioritized Dialing strategy on a skill, all phone #'s that meet the prime time calling hours are dialed first. When there are no phone #'s left to call within the prime time calling hour zones, the file begins dialing using the Curfew Only strategy (Follow the Sun). Prime time phone numbers are given top priority.

Region	Prime Time					
	Monday		Tuesday		Sunday	
	Morning	Evening	Morning	Evening	Morning	Evening
North America	08:00 - 09:00	18:00 - 20:00	08:00 - 09:00	18:00 - 19:00	08:00 - 09:00	18:00 - 19:00
Custom Prioritized	08:00 - 10:00	17:00 - 19:00	08:00 - 11:00	17:00 - 20:00	08:00 - 10:00	17:00 - 21:00
Curfew Exempted	08:00 - 10:00	17:00 - 21:00	08:00 - 10:00	17:00 - 19:00	08:00 - 11:00	17:00 - 19:00

Related Topics[Contact Timing Strategy](#)

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7.2.2 Restricted Dialing - LiveVox Voice Portal

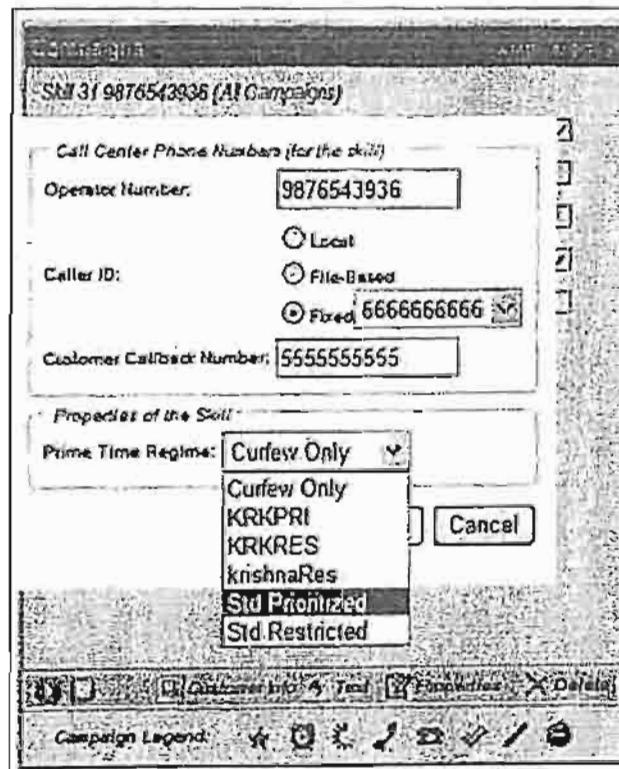
Page 1 of 2

RESTRICTED DIALING

When using the Restricted Dialing strategy on a skill, only phone numbers that meet the prime time calling hours are dialed. Using this strategy ensures that each attempt is made during the defined prime time hours. When there are no phone numbers left in a file that fall within the defined prime time hours, no calls will go out until another defined prime time window begins. Non-prime time accounts are *restricted* from dialing.

Regime	Prime Time					
	Monday		Tuesday		Sunday	
	Morning	Evening	Morning	Evening	Morning	Evening
<input checked="" type="checkbox"/> Std Prioritized	08:00 - 09:00	18:00 - 20:00	08:00 - 09:00	18:00 - 19:00	20:00 - 09:00	18:00 - 18:00
<input type="checkbox"/> Custom Prioritized	09:00 - 10:00	17:00 - 18:00	08:00 - 11:00	17:00 - 20:00	08:00 - 10:00	17:00 - 17:00
<input checked="" type="checkbox"/> Std Restricted	08:00 - 10:00	17:00 - 21:00	08:00 - 10:00	17:00 - 18:00	08:00 - 11:00	17:00 - 19:00

The contact timing strategies can be set at the skill level by clicking on the 'Properties' icon at the skill level. Once you select your desired Prime Time Regime press the 'Save' button to enable your selection.



7.2.2 Restricted Dialing - LiveVox Voice Portal

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Related Topics

[Contact Timing Strategy](#)

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PA77

8 Compliance - LiveVox Voice Portal

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COMPLIANCE

The following items are reviewed in the Compliance section:

- 8.1 Viewing current State Dialing Hours Restrictions
- 8.2 Configuring a Compliance Profile
 - 8.2.1 Add or Edit Curfews
 - 8.2.2 Add or Edit Blocks
- 8.3 Assigning a Compliance Profile to a Skill/Call Center

Related Topics

- [Viewing current State Dialing Hours Restrictions](#)
- [Configuring a Compliance Profile](#)
- [Assigning a Compliance Profile to a Skill/Call Center](#)

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8.1 Viewing current State Dialing Hours Restrictions - LiveVox Voice Portal

Page 1 of 4

VIEWING CURRENT STATE DIALING HOURS RESTRICTIONS

This section covers the State Dialing Hours Restriction of the Compliance page. All users can view the following:

- State/Province and Area code dialing hours restriction policies.
- State/Province and Area code exclusions on dialing and/or leaving messages.
- Skills/Call Centers these policies are applied to.



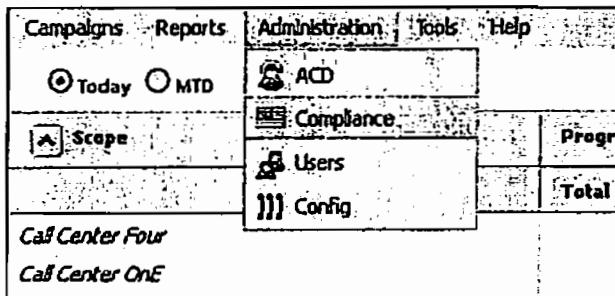
Site-specific compliance rules are not checked when scheduling callbacks, but are enforced when the callback launches. An error message will appear to the agent at the time of the attempted dial if outside of compliance.

If a state/area code does not have a specific setting assigned in the Compliance section the LiveVox State Dialing Hours Restriction Defaults will take effect. These defaults are described below:

- Default dialing hours window: 8:00 AM - 9:00 PM, except for the following:
 - Nevada: 9 AM ~ 8 PM
 - Pennsylvania: Sundays: 1:30 PM – 9 PM. Weekdays 9 AM – 9 PM.

To view your non-default State Dialing Hours Restriction policies follow these instructions:

- Navigate to the Compliance UI by selecting the 'Compliance' link from the Administration drop down menu from the main Voice Portal menu.



- You will be presented with the list of non-default dialing profiles available on your site:

- To view the skills or call centers to which a profile is applied select the clipboard icon in the Assign column.

8.1 Viewing current State Dialing Hours Restrictions - LiveVox Voice Portal

Page 2 of 4

- From the View dropdown you can select to view Curfews or Blocks. The Curfews section shows allowable hours that differ from the LiveVox default. The Blocks section shows prohibitions on dialing or leaving answering machine messages.



All times displayed are EST times.

- Selecting any compliance profile will allow users to view all states/provinces. Curfews or blocks assigned at either State/province level will be displayed. The following example shows the custom curfews for each state.

8.1 Viewing current State Dialing Hours Restrictions - LiveVox Voice Portal

Page 3 of 4

Configure Compliance	View Current	Audit	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
<input type="checkbox"/>									
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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<input type="checkbox"/>	<input checked="" type="checkbox"/>								
<input type="checkbox"/>	<input checked="" type="checkbox"/>								
<input type="checkbox"/>	<input type="checkbox"/>	<input type							

- Expanding each state/province will display a list of area codes within that region. Here you may view the restrictions for each individual area code.

8.1 Viewing current State Dialing Hours Restrictions - LiveVox Voice Portal

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Related Topics

Compliance

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PA82

8.2 Configuring a Compliance Profile - LiveVox Voice Portal

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CONFIGURING A COMPLIANCE PROFILE

A new compliance profile can be created to enact new allowable hours or dialing/messaging restrictions. These restrictions can be applied to an individual skill, multiple skills, or call centers. Customer is responsible for ensuring that it is compliant with applicable law regarding dialing hours.

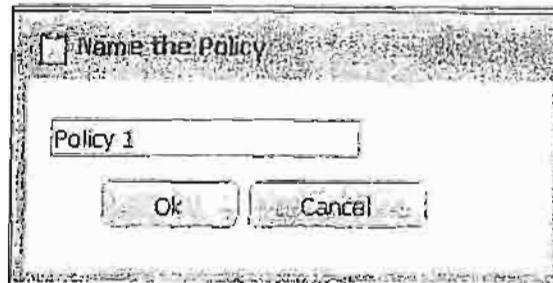


User must have Sysadmin or IT User level access to adjust Profiles.

- Select the "Add a new policy" button from the upper left pane.



- Type in the name of your new policy and select 'Ok'.



- Create allowable hours from the "Curfews" view or implement restrictions on leaving messages or calling using the "Blocks" view. Decide which skill(s)/call center(s) this should apply to using the 'Apply' button.

Related Topics

[Compliance](#)
[Add or Edit Curfews](#)
[Add or Edit Blocks](#)

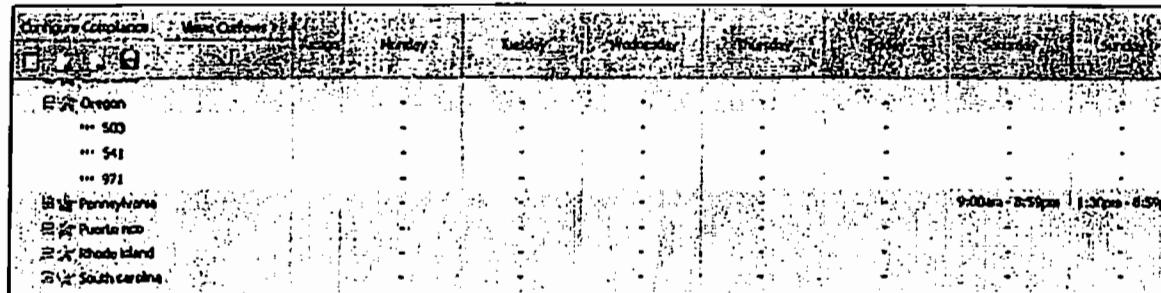
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8.2.1 Add or Edit Curfews - LiveVox Voice Portal

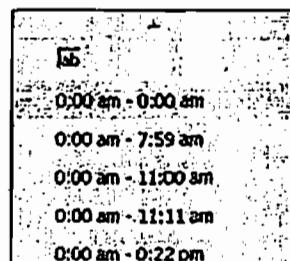
Page 1 of 2

ADD OR EDIT CURFEWS

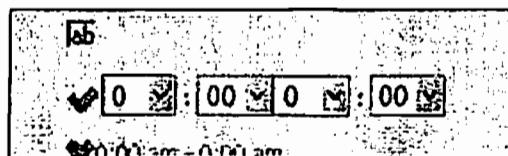
Curfews (allowable time to dial) are set on a day-of-the-week basis for either a State/Province or area code level. Area codes for each State/Province are visible after selecting the plus symbol to the left of the state name. After determining what your restriction should be select the appropriate day of the week and region from your profile's settings.



- A window with optional hours appears. Choose a preconfigured hour range or choose the "ab" button to select your own hours.



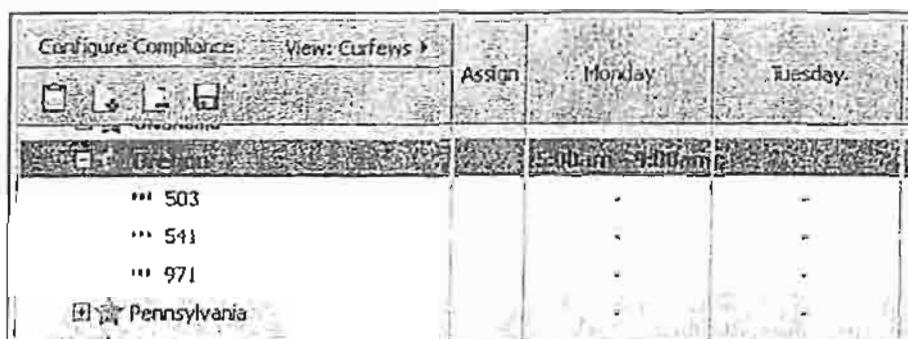
- Use the dropdown options that appear to input your start hour/minute and end hour/minute. Select the green checkmark to save your new dialing window. Keep in mind all times are in EST.



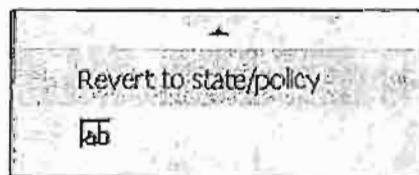
- The selected dialing window should appear in bold font for the region and day you selected.

8.2.1 Add or Edit Curfews - LiveVox Voice Portal

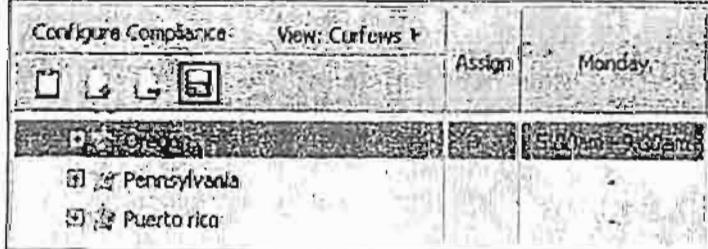
Page 2 of 2



- To revert to the LiveVox State Dialing Hours Restriction default instead of your choice, click on the time period and select "Revert to state/policy".



- Save your changes using the floppy disk symbol. Your settings are saved when the font changes from bold to regular.



Related Topics

[Configuring a Compliance Profile](#)

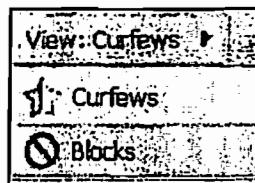
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8.2.2 Add or Edit Blocks - LiveVox Voice Portal

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ADD OR EDIT BLOCKS

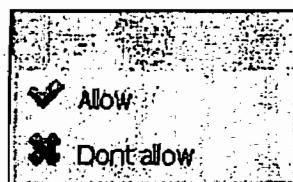
- Select View->Blocks to view and adjust Blocks in place, which restrict dialing or leaving automated messages on Answering Machines.



Blocks are set on a day-of-the-week basis for either a State/Province or area code level. Area codes for each State/Province are visible after selecting the plus symbol to the left of the state name. After determining what your restriction should be select the appropriate day of the week and region for either dialing ("Dial") or leaving messages ("Msgs") column.

Configurations	View Block	Header	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
<input checked="" type="checkbox"/> Testing Profile	<input type="checkbox"/>								
	<input checked="" type="checkbox"/> Alabama								
	<input checked="" type="checkbox"/> Alaska								
	<input checked="" type="checkbox"/> Arizona								
	<input checked="" type="checkbox"/> Arkansas								
	<input checked="" type="checkbox"/> California								
	<input checked="" type="checkbox"/> Colorado								
	... 303								
	... 719								
	... 730								
	... 970								

- You will be prompted to choose either neutral (LiveVox State Dialing Hours Restriction Default), 'Allow', or 'Don't Allow'.



- After making selections fonts will change to bold to indicate changes have not been saved.

8.2.2 Add or Edit Blocks - LiveVox Voice Portal

Page 2 of 2

Configure Compliance	View: Blocks	Assign	Monday		Tuesday	
			Dial	Msgs	Dial	Msgs
<input type="checkbox"/> Testing Profile			-	-	-	-
<input type="checkbox"/> Alabama			-	-	-	-
<input type="checkbox"/> Alaska			-	-	-	-
<input type="checkbox"/> Arizona			-	-	-	-
<input type="checkbox"/> Arkansas			-	-	-	-
<input type="checkbox"/> California						
<input type="checkbox"/> Colorado			-		-	-
... 303			-		-	-
... 719			-		-	-
... 720				-	-	-
... 970			-		-	-
<input type="checkbox"/> Connecticut			-		-	-

- Save your changes using the floppy disk symbol. Your settings are saved when the font changes from bold to regular.

Configure Compliance	View: Blocks	Assign	Monday		Tuesday	
			Dial	Msgs	Dial	Msgs
<input type="checkbox"/> Testing Profile			-	-	-	-
<input type="checkbox"/> Alabama			-	-	-	-
<input type="checkbox"/> Alaska			-	-	-	-
<input type="checkbox"/> Arizona			-	-	-	-
<input type="checkbox"/> Arkansas			-	-	-	-
<input type="checkbox"/> California						
<input type="checkbox"/> Colorado			-		-	-
... 303			-		-	-
... 719			-		-	-
... 720				-	-	-
... 970			-		-	-
<input type="checkbox"/> Connecticut			-		-	-

Related Topics

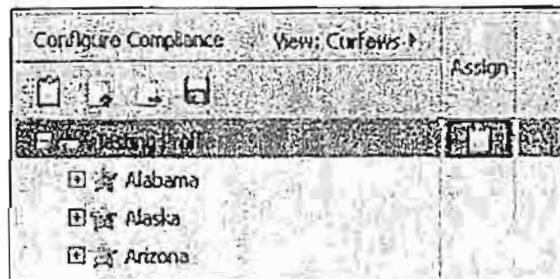
[Configuring a Compliance Profile](#)Copyright (c) 2012 LiveVox, All Rights Reserved.

8.3 Assigning a Compliance Profile to a Skill/Call Center - LiveVox Voice Portal

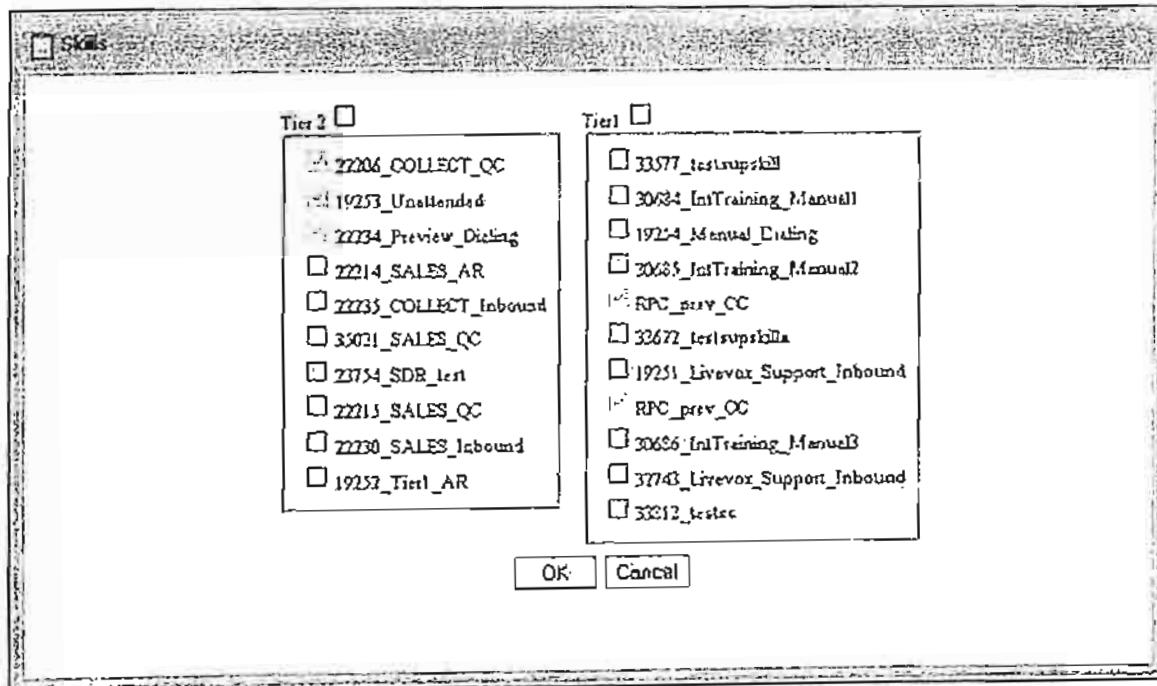
Page 1 of 3

ASSIGNING A COMPLIANCE PROFILE TO A SKILL/CALL CENTER

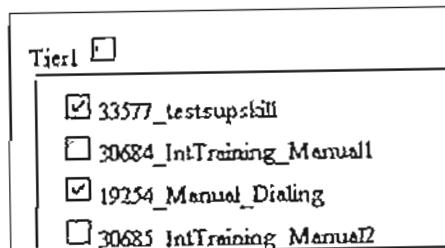
- Assign a policy to a skill/call center using the clipboard symbol next to the policy's name in the "Assign" column.



- The "Skills" window will appear.



- Select individual skills using the checkbox next to their name.



- Select or deselect an entire call center using the checkbox next to its name.

8.3 Assigning a Compliance Profile to a Skill/Call Center - LiveVox Voice Portal

Page 2 of 3

Tier1	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> 33577_testsupskill
	<input checked="" type="checkbox"/> 30684_InitTraining_Manual1
	<input checked="" type="checkbox"/> 19254_Manual_Dialing
	<input checked="" type="checkbox"/> 30685_InitTraining_Manual2
	<input checked="" type="checkbox"/> RPC_prev_CC
	<input checked="" type="checkbox"/> 33622_testsupskills
	<input checked="" type="checkbox"/> 19251_Livevox_Support_Inbound
	<input type="checkbox"/> RPC_prev_CC
	<input checked="" type="checkbox"/> 30686_InitTraining_Manual3
	<input checked="" type="checkbox"/> 32743_Livevox_Support_Inbound
	<input checked="" type="checkbox"/> 33812_testcc

- Once the skills or call centers match your intended policy select the 'OK' button Select the floppy disk 'Save' button to save the skill/call center assignment changes.

Configure Compliance	View Curfews	Assign	Monday
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Pennsylvania			
<input checked="" type="checkbox"/> Puerto Rico			



A new policy cannot be applied to a skill until individual state or area code component has been added. The "Assign" symbol will not be visible but the message "Please customize the policy before assigning it to a skill" will be shown.

8.3 Assigning a Compliance Profile to a Skill/Call Center - LiveVox Voice Portal

Page 3 of 3

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Related Topics
Compliance

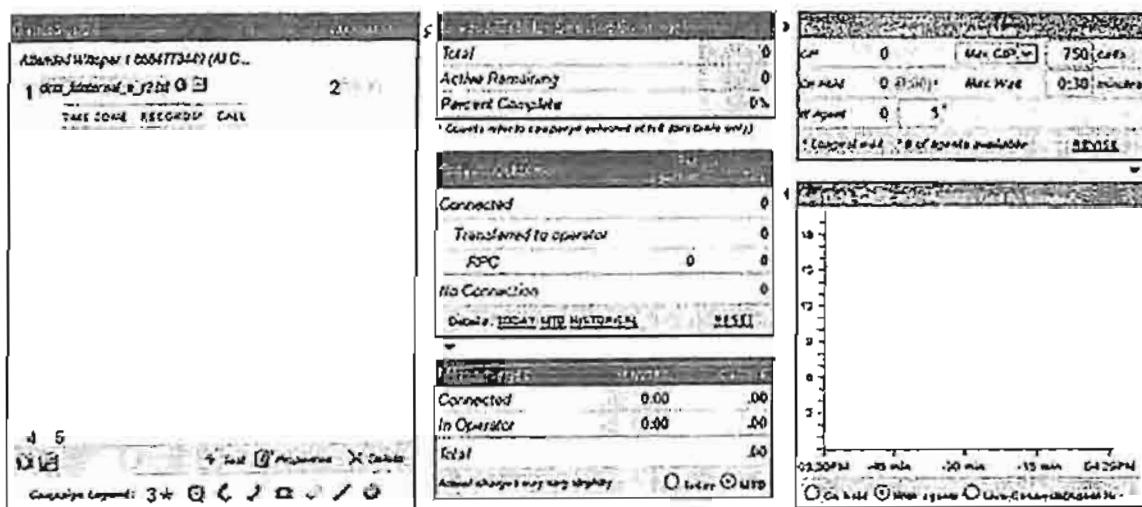
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PA90

RUNNING A CAMPAIGN (EXECUTING A CAMPAIGN)

This section covers the process after a loaded campaign has been built. At this point managers are able to begin dialing on accounts. The following section illustrates how this is done, as well as some useful features that are used to control and change the properties of individual campaigns/files.

Navigate to the Skill page by right clicking on the selected campaign file in the Campaign Manager or by selecting the skill from the Skill view described in section 2.



- Loaded campaigns display below the skill name (1). Multiple calling campaigns can be loaded to any skill. Click on each campaign to select it before further action can take place. Up to 20 campaigns can play on a skill simultaneously.
- For each file, the option to detect answering machines and/or leave messages on detected answering machines is available by simply checking the MSG box (to leave messages) or the AMD box (to detect answering machines) next to the file name (2).



Messaging settings adjusted in this form will overwrite settings defined in the Campaign Manager section of the Voice Portal when the file was uploaded.

- For each highlighted campaign, one of 8 different icons will appear to the immediate right of the campaign file name. These icons represent the status of each campaign and are as follows (3):

	Ready	Ready to Play on demand. If blue the campaign has already been built.
	Scheduled	Scheduled to play at a pre-set time. If blue the campaign has already been built.
	Loading	System is preparing the campaign.

9 Running a Campaign (Executing a Campaign) - LiveVox Voice Portal

Page 2 of 3

 Playing	The campaign is active. Calls are being made.
 Paused	Ready to resume playing.
 Done	The campaign has finished or been stopped.
 Reported	The campaign has finished or been stopped, and has been reported.
 Error	The campaign file has encountered errors.

- Highlighted campaigns are controlled with the 'play/pause' toggle button, and can be stopped before they finish with the 'stop' button (4). Stopped files will be sent to report and must be requested to dial again.
- LiveVox allows for pre-building of the file before dialing by clicking on a file and then clicking on the wrench icon to pre-build the file (5).
- The LiveVox dashboard provides controls and data (real time and aggregate) at the campaign or skill level, depending on whether the skill name or individual campaign is highlighted.

9 Running a Campaign (Executing a Campaign) - LiveVox Voice Portal

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10 Campaign Window Functionality - LiveVox Voice Portal

Page 1 of 1

CAMPAIGN WINDOW FUNCTIONALITY

This section covers how to edit campaign properties and look up information for call attempts via the customer lookup information function. The following items are reviewed in this section:

- 10.1 Editing Campaign Properties
- 10.2 Customer Information Lookup

Related Topics

- [Editing Campaign Properties](#)
- [Customer Information Lookup](#)

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10.1 Editing Campaign Properties - LiveVox Voice Portal

Page 1 of 4

EDITING CAMPAIGN PROPERTIES

For any given highlighted campaign, if the 'Properties' button is clicked, the phone numbers associated with that campaign/file will be displayed.



You can only edit the properties of a paused campaign.

To edit campaign properties, in the Skill Page click on 'Properties' icon when no campaign has been selected.

- Caller ID (CID) sources are configurable for individual skills. Please contact LV Client Services for assistance in configuring additional options. These options include:
 - 'Fixed' – single CID for the entire campaign, with a dropdown of selectable options.
 - 'File-based' – the CID utilized is assigned to each account in the campaign file
 - 'Local' – automatically selected number that is local or, if local number is unavailable, one that is reasonably proximate, from the Local Caller ID (LCID) package assigned to the skill that matches the attempted phone number's area code.
 - 'Local' option (in Red below) will only be displayed if the Local Caller ID feature is enabled:



Caller ID Name will display as blank on the consumers' phone (In rare cases, issues with a local exchange carrier's systems may result in a legacy name displaying on a call recipient's caller ID. This error is outside of LiveVox's control. Please contact LiveVox if you become aware of such a display error)

10.1 Editing Campaign Properties - LiveVox Voice Portal

Page 2 of 4

Call Center Phone Numbers (for the skill)

Operator Number:	Caller ID:	Callback Number:
Fixed <input checked="" type="radio"/> 5555555555	<input checked="" type="radio"/> 8884773448	<input checked="" type="radio"/> 1158049945
File-Based <input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local <input type="radio"/>		

Properties of the Skill

Prime Time Regime:	Curfew Only
Max Attempts Per Day:	1

Submit **Cancel**

- If the Local Caller ID feature is not enabled, the following options will be available:

Call Center Phone Numbers (for the skill)

Operator Number:	Caller ID:	Callback Number:
Fixed <input checked="" type="radio"/> 8007654321	<input checked="" type="radio"/> 4055550199	<input checked="" type="radio"/> 8888888888
File-Based <input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Properties of the Skill

Prime Time Regime:	Curfew Only
Max Attempts Per Day:	1

Submit **Cancel**

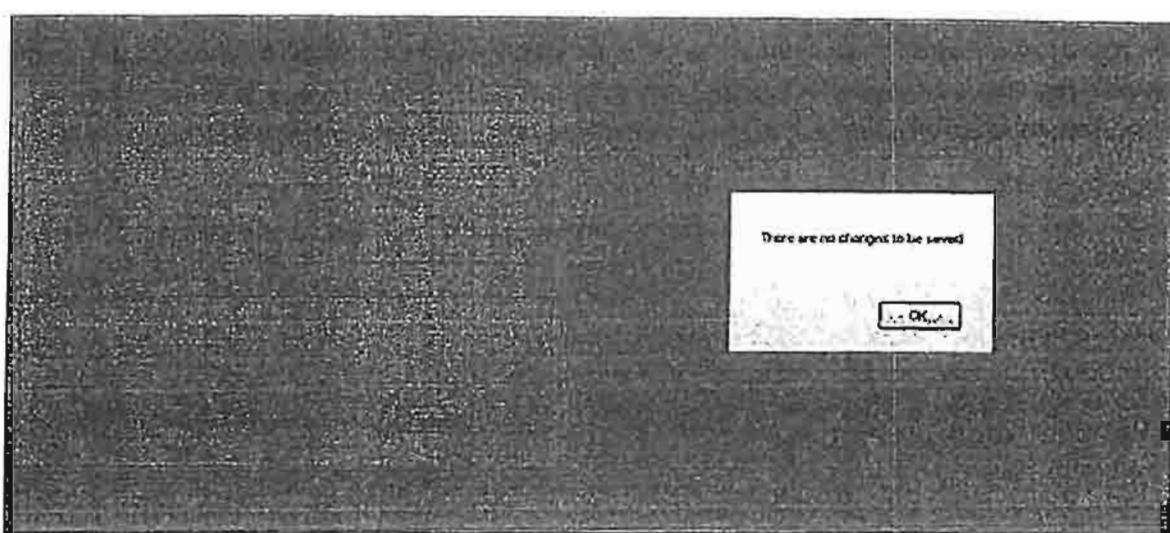


These modifications are not permanent and any edited number (Operator Number, Caller ID Number, or Customer Call Back Number) will revert to the default setting once the campaigns are reported, or if a new file is loaded.

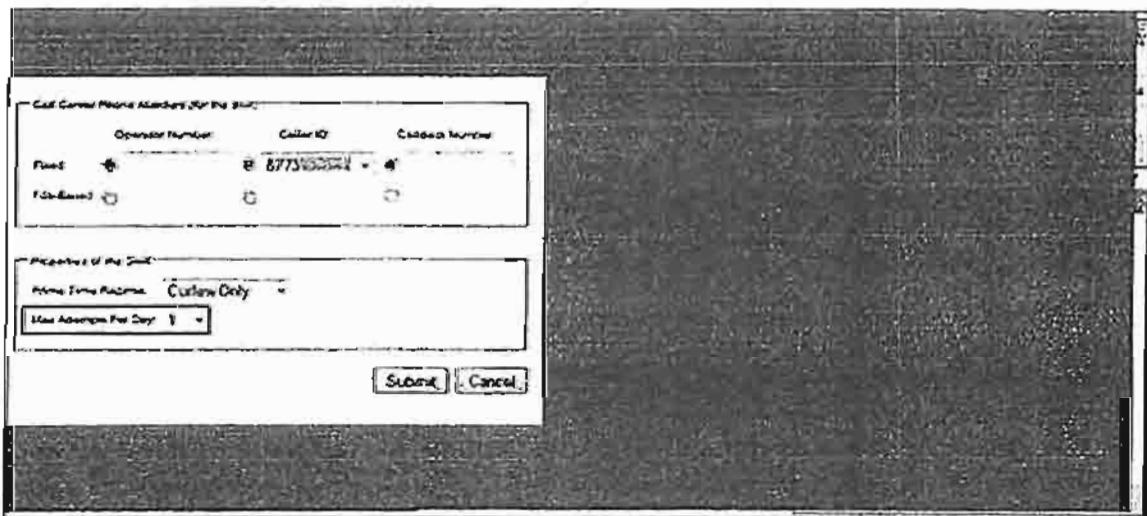
An alert will be displayed and users will be unable to save modified numbers if an invalid number is entered.

10.1 Editing Campaign Properties - LiveVox Voice Portal

Page 3 of 4



- 'Max Attempts Per Day' skill properly allows you to set the maximum number of attempts that can be made to any particular account in a day for that skill.
 - For example, if you set max attempts for a skill (as shown below) to '1'. It means that only 1 call will be sent that day from the same account number. Once max attempts (1 in this case) are reached, the accounts will be excluded from dialing, reporting as 'Maximum Account Attempts Reached (Not Made)'. As it works in an intraday fashion, the same account numbers which got excluded today would be considered "new" the next day.



- Please note that this functionality works across those skills, and only those skills, which have this feature enabled. If a particular skill does not have this feature enabled, then there is no maximum number of attempts for calls using that skill. For total coverage of the maximum attempts per account per day feature, customers should consider enabling it across all skills. To enable and for additional details on this feature, please contact client-services@livevox.com
- Setting max attempts from the skill properties page can override any max attempts setting that may already exist for this skill.

10.1 Editing Campaign Properties - LiveVox Voice Portal

Page 4 of 4



Max attempts cannot be set for manual skills.

Related Topics

[Campaign Window Functionality](#)

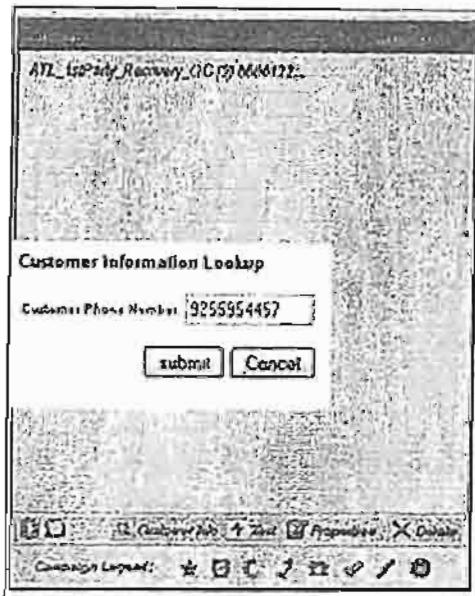
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10.2 Customer Information Lookup - LiveVox Voice Portal

Page 1 of 2

CUSTOMER INFORMATION LOOKUP

All attempts for the past 31 days to a specific phone number on the currently selected skill can be viewed via the 'Customer Info' lookup button.



- Click on "Customer Info".
- Enter the 10 digit phone number (no spaces, no special characters) to be searched and click "Submit."
- All attempts for the past 31 days will be displayed on the screen (below). This will include Call Center, Skill, Name, Account, Agent, Date, Start/End Times, Campaign and Outcome. Summary can be exported to PDF or Excel format.

Summary								Export to PDF/Excel
Client	LIVEVOX DEMO							
Call Center	Atlanta >							
skill	Blank LeParry							
Phone Number	9255954457							
Start Date	10/16/2002							
End Date	11/17/2002							
Reports								
CallCenter/Ext	Name	Account	Agent	Date	Start	End	Campaign	Outcome
Atlanta > Blank LeParry	James	3273449		Mon Nov 17 2002	6:43:34 PM	6:46:13 PM	test_leparry_11641_1234563318271	Unlinked
Atlanta > Blank LeParry	James	3273449		Mon Nov 17 2002	6:43:29 PM	6:49:54 PM	test_leparry_11641_12345633182153	Unlinked

10.2 Customer Information Lookup - LiveVox Voice Portal

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Related Topics

[Campaign Window Functionality](#)

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PACING AND AGENT MANAGEMENT

This section provides an overview of the available pacing tools and how to effectively manage agents and the pacing of outbound campaigns with the LiveVox Voice Portal. The following items are reviewed in this section:

- 11.1 Skill Activity Box**
 - 11.1.1 Pacing Methods**
- 11.2 Real Time Graphs**
 - 11.2.1 Average Calls on Hold Graph**
 - 11.2.2 Average Calls with Agents Graph**
 - 11.2.3 Live Connects per Agent Hour**
- 11.3 ACD Queues**
 - 11.3.1 Pacing Information on ACD Queue Page**
 - 11.3.2 Agent Queue**
 - 11.3.3 Agent Monitoring**
 - 11.3.4 Accessing the Agent Monitoring Suite**
 - 11.3.5 Agent Monitoring by Client Auditors**
 - 11.3.6 Managing Agent Inactivity**
 - 11.3.7 Hold Queue**
 - 11.3.8 Sort ACD Queue**

Related Topics

- [Skill Activity Box](#)
- [Real Time Graphs](#)
- [ACD Queues](#)

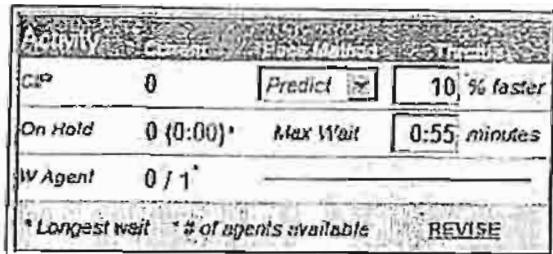
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II.1 Skill Activity Box - LiveVox Voice Portal

Page 1 of 2

SKILL ACTIVITY BOX

The skill activity box is located in the upper right-hand side of the Skill Page.



The skill activity box allows you to view:

- The total number of calls that are in progress.
- The total number of calls that are currently with an agent.
- The total number of calls that are currently in the hold queue waiting to be transferred to an agent.
- The length of time on hold for the call that has been in the hold queue the longest.
- Pace Method selected and Throttle.
- The Max Wait time for the skill.

To update the pace method or throttle, enter the intended changes and select "Revise." The system will make the change and give you a confirmation that the changes have been made.

Definitions for terms in the Skill Activity Box:

- **CIP:** Calls In Progress – current # of lines in use
- **On Hold:** # of calls on hold waiting to be transferred to an agent. This is followed in parenthesis by the duration of the longest call on hold.
- For example, 2(0:30) would mean you have 2 calls on hold. The longest call on hold is 30 seconds.
- **Max Wait:** maximum amount of time a call can be on hold. Sets the time threshold of when the Voice Portal will play the Failed Operator Transfer message to the customer and then terminate the call. On inbound calls the customer is either disconnected and given the Failed Operator Transfer message or bridged to the voicemail number, depending on the skill-specific settings.
- For example, for a max wait of 55 seconds the value 0:55 should be used. For 1 minute 30 seconds the value 1:30 should be applied. For any value over 9:59, enter the number of seconds and the system will convert the value for you.
- **W Agent:** this displays the # of active calls with an agent followed by the # of agents logged into the skill.
- For example, 1/2 * means that there are 2 agents logged in and 1 of them was on an active call.

Related Topics

- [Pacing and Agent Management](#)
[Pacing Methods](#)

11.1 Skill Activity Box - LiveVox Voice Portal

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11.1.1 Pacing Methods - LiveVox Voice Portal

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PACING METHODS

There are 3 types of Pacing Methods available: Abandon Rate (ACD v. 2.1.3)/ Predict (pre-ACD v. 2.1.3), #/Agent, and Max CIP.

- Abandon Rate (Available in ACD v. 2.1.3)
 - Sets line per agent based on a calculation of the number of abandoned calls vs. the number of successful transfers. System then determines the optimal time to launch calls in order to achieve target abandon rate.

CIP	0	Abandon Rate	5 %
On Hold	0 (0:00)	Max Wait	1:30 minutes
W Agent	0 / 0		
* Longest wait * # of agents available REVISE			

- c For example.
 - A dialing manager has the pacing method set to lines per agent (#/agent) at a high throttle. After 25 attempted transfers, 10 calls are abandoned, giving an abandon rate of 40% ($10 \div 25$). The pacing method is then changed to Abandon Rate with an acceptable rate of 5%. Since the Caller Abandon Rate is currently 40%, the system will reduce the total number of lines per agent in order to compensate for the abandonment discrepancy. Calls will be launched more slowly in order to adjust down to the total lines per agent necessary to achieve 5% abandonment.
- Predict (Available in versions before ACD v.2.1.3)
 - The predict algorithm is based on a number of factors calculated around a proprietary formula. The Predict pace method can be adjusted on a sliding scale of 0-100%. The throttle allows the user to tell the system to launch calls earlier in order to be more aggressive.



Predictive pacing works best with more than 8-10 agents.

CIP	0	Predict	100 %
On Hold	0 (0:00)	Max Wait	0:55 minutes
W Agent	0 / 1		
* Longest wait * # of agents erodable REVISE			

- #/Agent (Lines per agent)
 - #/Agent (Lines per agent) paces based on the number of lines dialed for each agent in the Ready status. When using this pace method the number of agents in Ready status is multiplied by the value in the Throttle box.

11.1.1 Pacing Methods - LiveVox Voice Portal

Page 2 of 2

o For example:

- If the Throttle is set to 10 and 5 agents are in the "Ready" status, the max allowable Calls-in-progress will be 50.

CIP	0	Max CIP	7 lines
On Hold	0 (0:00)*	Max Wait	0:55 minutes
W Agent	0 / 1*		
*Longest wait *# of agents available		REVISE	

• Max CIP

- This pacing method is built specifically for unattended campaigns. It dials a fixed number of lines regardless of the number of agents logged in or Ready.

CIP	0	Max CIP	500 calls
On Hold	0 (0:00)*	Max Wait	1:30 minutes
W Agent	0 / 0*		
*Longest wait *# of agents available		REVISE	

Related Topics

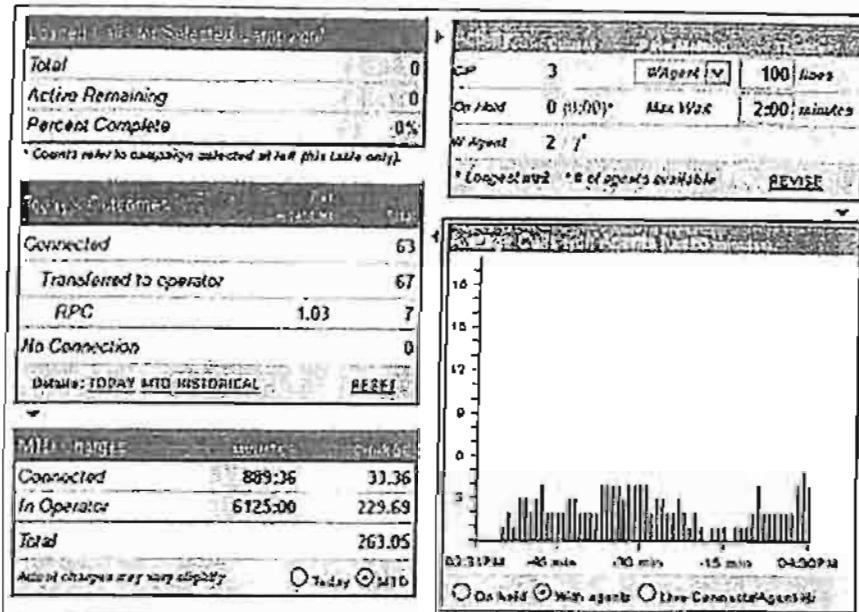
[Skill Activity Box](#)Copyright (c) 2012 [LiveVox](#), All Rights Reserved.

11.2 Real Time Graphs - LiveVox Voice Portal

Page 1 of 1

REAL TIME GRAPHS

Real-Time Graphs are available in the lower-right corner of the Skill page. A user can toggle back and forth between them by clicking on the radio buttons below the graph.



- Graphs are an aggregate of the past 1 hour.
- Graphs are updated in real-time.

Related Topics

[Pacing and Agent Management](#)
[Average Calls on Hold Graph](#)
[Average Calls with Agents Graph](#)
[Live Connects per Agent Hour](#)

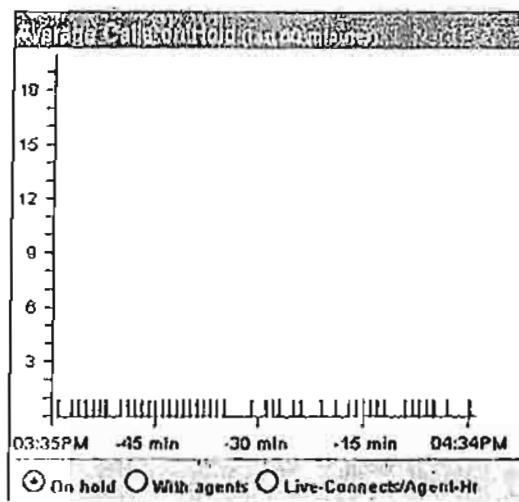
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11.2.1 Average Calls on Hold Graph - LiveVox Voice Portal

Page 1 of 1

AVERAGE CALLS ON HOLD GRAPH

This graph reflects the average number of calls on hold for the last hour.



- An average number of calls on hold that is above normal for your call center indicates you are most likely dialing too rapidly and indicates over pacing.
- An average number of calls on hold that is below normal for your call center indicates you are most likely dialing too slowly and indicates under pacing.

Related Topics

[Real Time Graphs](#)

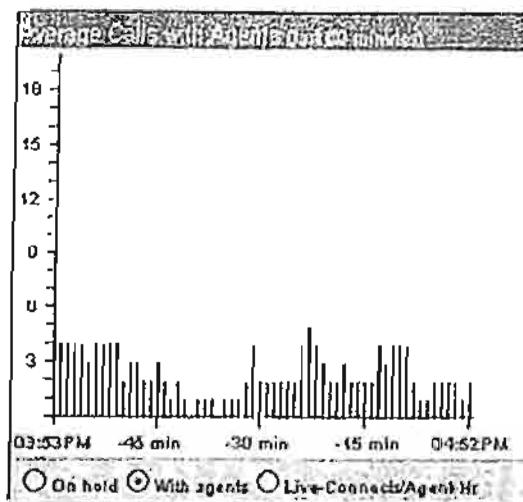
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11.2.2 Average Calls with Agents Graph - LiveVox Voice Portal

Page 1 of 1

AVERAGE CALLS WITH AGENTS GRAPH

This graph reflects the average number of calls with an agent for the last hour.



- Having more agents on calls is a positive outcome; however, you will want to check your abandonment rate to make sure that you are not dropping too many calls in order to keep agents as busy as you require. (See Reporting)
- An average number of calls with agents that is below normal for your call center indicates you are most likely dialing too slowly and may be under pacing. Usually if you see this, you will have a low abandonment rate.



These graphs provide real-time hourly aggregate data. This information is collected constantly, even when no campaign has been configured and run on the skill. If there are instances where no calls are with agents, ensure that the campaign has been active at that time.

Related Topics

[Real Time Graphs](#)

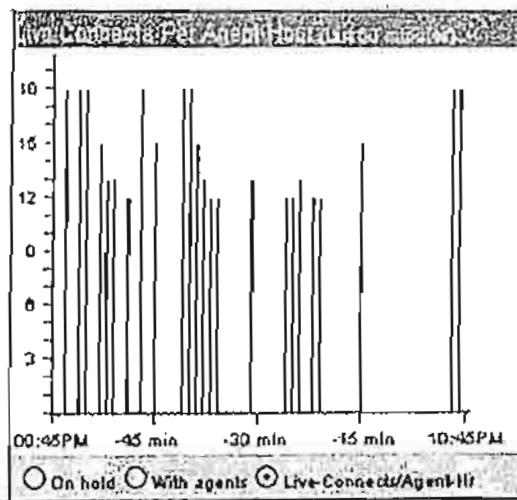
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11.2.3 Live Connects per Agent Hour - LiveVox Voice Portal

Page 1 of 1

LIVE CONNECTS PER AGENT HOUR

This graph reflects the total number of calls connected with an agent for the last hour.



This graph displays the calculation of agent connects/agent hour in one minute increments over the last 60 minutes. Agents in Ready, Wrapup or Incall statuses contribute to the agent hour value. This allows you to compare the volume of connected calls vs. the volume of agents logged in.

Related Topics

[Real Time Graphs](#)

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11.3 ACD Queues - LiveVox Voice Portal

Page 1 of 1

ACD QUEUES

ACD Queues are accessed by clicking the "ACD" radio button in the top right portion of the main skill page. The scope of ACD queue page is controlled by the scope of the view on the campaign page for accessing the ACD queue. For example, if you are at the Enterprise campaign view you will see the Enterprise ACD queue. The call center campaign view is a call center ACD queue. The skill campaign view is a skill ACD queue. Additionally, the scope is defined by the access assigned to your user account.

CP	0	Max Cpl.	70 calls
On Hold	0 (0:00)*	Max Wait	8:00 minutes
W Agent	0 : 0*	* Longest wait * # of agents available	
		REVISE	

Once you are in the ACD Queue screen, two buttons appear on the upper left-hand side of the screen:

- Agent Queue
- Hold Queue

Hold Queue Summary	Calls on Hold	0	Top Hold Time:	00:00:00				
Avg Agent Queue Times:	Avg.Waiting Time:	00:00:03	Avg.Training Time:	00:01:32	Avg.Wrapup Time:	00:00:00	Avg.Utillized Time:	00:02:10
Last 30 Minutes:	Avg.Waiting Time:	00:02:32	Avg.Training Time:	00:01:50	Avg.Wrapup Time:	00:00:09	Avg.Utillized Time:	00:03:06
Metrics	Line View	Graphical View	Set	Total Agents: 0				

Additional information is provided in sections 11.3.2 and 11.3.3.

Related Topics

- [Pacing and Agent Management](#)
- [Pacing Information on ACD Queue Page](#)
- [Agent Queue](#)
- [Agent Monitoring](#)
- [Accessing the Agent Monitoring Suite](#)
- [Agent Monitoring by Client Auditors](#)
- [Managing Agent Inactivity](#)
- [Hold Queue](#)
- [Sort ACD Queue](#)

11.3.1 Pacing Information on ACD Queue Page - LiveVox Voice Portal

Page 1 of 1

PACING INFORMATION ON ACD QUEUE PAGE

Pacing controls for a selected skill will be displayed on the ACD queue page. This feature is disabled when multiple skills are viewed. Pacing controls are visible for read-only purposes and cannot be modified from the ACD queue page.

The screenshot shows the 'ACD Queue Page' interface. At the top, there are two radio buttons: 'Agent Queue' (selected) and 'Hold Queue'. To the right are two small icons: 'Customer' (a person icon) and 'ACD' (a telephone handset icon).

Below the radio buttons, there are two sections:

- Hold Queue Summary:** Shows 'Calls on Hold: 0' and 'Avg Hold Time: 00:00:00'.
- Avg Agent Queue Times:** Shows 'Avg Waiting Time: 00:00:43', 'Avg Talking Time: 00:03:11', 'Avg Wrapup Time: 00:00:00', 'Avg Unavail Time: 00:00:00', and 'Len 39 Minutes'.

At the bottom, there is a table titled 'Agents' with columns: Call Name, Logon ID, Status, Account, Customer Phone, Description, and Duration. The table contains several rows of agent information.

Related Topics

[ACD Queues](#)

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11.3.2 Agent Queue - LiveVox Voice Portal

Page 1 of 3

AGENT QUEUE

This queue will show you all of the agents that are currently logged in and their status on the system.

The screenshot shows the 'Agent Queue' section of the LiveVox Voice Portal. At the top, there are two radio buttons: 'Agent Queue' (selected) and 'Hold Queue'. Below them are three summary sections: 'Grid Queue Summary', 'Avg Agent Queue Times', and 'Last 24 Hours'. The 'Grid Queue Summary' section includes a table with columns: Call#, Agent#, Avg Hold Time, Max Hold, and Agents. It also displays 'Avg Agent' and 'Longest wait * # of agents available'. The 'Avg Agent Queue Times' section shows Avg Waiting Time, Avg Talking Time, Avg Wrapup Time, and Avg Universal Time. The 'Last 24 Hours' section shows similar metrics for the last 24 hours. Below these summaries is a table titled 'Master' with columns: Extension, Login ID, Name, State, Account, Customer Phone, Classification, and Duration. The table lists several agents with their current state (e.g., NOTREADY, DND, READY, INCALL) and duration of calls.

FAQ - Agent Queue Management:

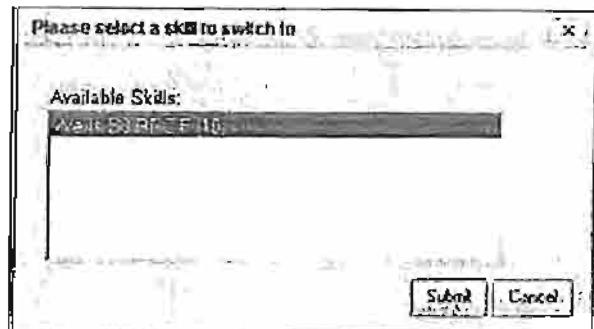
- What status are the agents in?
 - The 'State' column will tell you the current status of an agent. Available statuses are:
 - READY – Agent is idle and ready to receive calls
 - NOTREADY – Agent is currently in a "break" status and is not able to receive calls. Outlined below are available Not Ready reason codes that can be activated upon request. This is a standard set that cannot be edited.
 - Lunch
 - Training
 - Break
 - Meeting
 - Tech
 - Difficulties
 - Other
 - INCALL – Agent is currently on an active call.
 - WRAPUP – Agent has completed active call, is currently in wrapup state. The maximum wrapup time can be implemented and adjusted for each individual agent.

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11.3.2 Agent Queue - LiveVox Voice Portal

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- PREVIEW DIALING - Agent is in Preview Dialing mode with the option to dial, skip, or enter and dial another phone number manually.
- INCALL (Inbound) - Agent is currently on an active inbound call.
- Are they in a status that would enable them to receive a LiveVox call?
 - Agents can only receive a LiveVox call if they are in a "Ready" status
 - The system will only make outbound calls based upon the number of agents in a "Ready" status.
- How long have they been in any given status?
 - The duration column will show you how long an agent has been in their current status.
- Managers have the ability to switch an agent from one skill to another.
 - If the agent is in "READY" or "NOTREADY" state, then the agent is immediately switched to the new skill.
 - If the agent is in any other state, then the request is queued and the agent is switched to the new skill after changing to "READY" or "NOT READY".
 - Can be done by right clicking on the agent in the ACD screen and choosing "Switch Skill" (see Agent Queue screen shot above).
 - Choose the skill that you would like to switch the agent to and click on 'Submit'.



- The agent will receive a screen pop advising of the switch. The agent will need to follow the directions on the screen. Once completed, the agent will be logged into the new skill.
- Managers are able to change the states of agents currently in "Ready", "Not Ready" or "Wrap up" states.
 - From "Ready" to "Not Ready" or "Logoff"
 - From "Not Ready" to "Ready" or "Logoff"

Monitor		Detail View		Graphical View		San		Total Agents: 1
SID Name	Login ID	Name	Status	Account	Customer Phone	Description	Duration	
WORKER	REPF110	TEAM	READY	MONITOR	100-1000000000	Monitor Coach Barge Ready Not Ready Logoff Switch Skill	00:00:00	

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11.3.2 Agent Queue - LiveVox Voice Portal

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- A validation step is available to confirm the change of the agent state. Please review the highlighted agent before clicking 'OK' to ensure changes are applied to the correct agent. Once a change is made, the new state of the agent will be displayed in the ACD queue.

Related Topics

[ACD Queues](#)

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11.3.2 Agent Queue - LiveVox Voice Portal

Page 1 of 3

AGENT QUEUE

This queue will show you all of the agents that are currently logged in and their status on the system.

The screenshot shows the 'Agent Queue' section of the LiveVox Voice Portal. At the top left, there are two radio buttons: 'Agent Queue' (selected) and 'Hold Queue'. Below them are three summary sections: 'Hold Queue Summary', 'Avg Agent Down Time', and 'Last 30 Minutes'. The 'Hold Queue Summary' section includes fields for 'Calls on Hold' (0), 'Top Hold Time' (00:00:00), and 'Longest Hold' (00:00:00). The 'Avg Agent Down Time' section shows 'Avg Working Time' (00:05:34), 'Avg Talking Time' (00:04:41), 'Avg Wrapup Time' (00:00:00), and 'Avg Unavail Time' (00:00:20). The 'Last 30 Minutes' section shows 'Avg Working Time' (00:02:53), 'Avg Talking Time' (00:01:38), 'Avg Wrapup Time' (00:00:00), and 'Avg Unavail Time' (00:02:02). To the right of these sections is a small chart titled 'Agent Status' showing the count of agents in various states: Ready (100%), Busy (100%), and Unavailable (0%). Below these sections is a table titled 'Agents' with columns: Session, Login ID, Name, State, Account, Customer Name, Classification, and Duration. The table lists six agents, each with a status of 'NOTREADY' or 'READY'.

FAQ - Agent Queue Management:

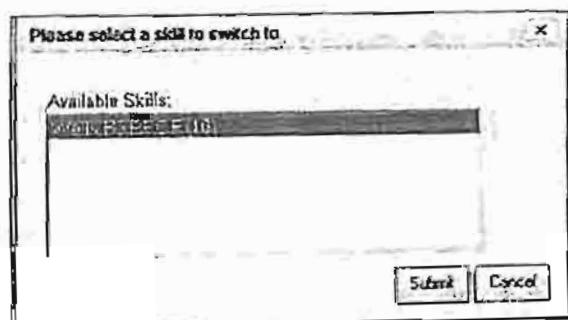
- What status are the agents in?
 - The 'State' column will tell you the current status of an agent. Available statuses are:
 - READY – Agent is idle and ready to receive calls
 - NOTREADY – Agent is currently in a "break" status and is not able to receive calls. Outlined below are available Not Ready reason codes that can be activated upon request. This is a standard set that cannot be edited.
 - Lunch
 - Training
 - Break
 - Meeting
 - Tech
 - Difficulties
 - Other
 - INCALL – Agent is currently on an active call.
 - WRAPUP – Agent has completed active call, is currently in wrapup state. The maximum wrapup time can be implemented and adjusted for each individual agent.

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11.3.2 Agent Queue - LiveVox Voice Portal

Page 2 of 3

- PREVIEW DIALING - Agent is in Preview Dialing mode with the option to dial, skip, or enter and dial another phone number manually.
 - INCALL (Inbound) – Agent is currently on an active inbound call.
 - Are they in a status that would enable them to receive a LiveVox call?
 - Agents can only receive a LiveVox call if they are in a "Ready" status
 - The system will only make outbound calls based upon the number of agents in a "Ready" status.
 - How long have they been in any given status?
 - The duration column will show you how long an agent has been in their current status.
 - Managers have the ability to switch an agent from one skill to another.
 - If the agent is in "READY" or "NOTREADY" state, then the agent is immediately switched to the new skill.
 - If the agent is in any other state, then the request is queued and the agent is switched to the new skill after changing to "READY" or "NOT READY".
 - Can be done by right clicking on the agent in the ACD screen and choosing "Switch Skill" (see Agent Queue screen shot above).
 - Choose the skill that you would like to switch the agent to and click on 'Submit'.



- o The agent will receive a screen pop advising of the switch. The agent will need to follow the directions on the screen. Once completed, the agent will be logged into the new skill.
 - Managers are able to change the states of agents currently in "Ready", "Not Ready" or "Wrap up" states.
 - o From "Ready" to "Not Ready" or "Logoff"
 - o From "Not Ready" to "Ready" or "Logoff"

Address	Logon ID	Name	Status	Account	Customer Phone	Classification	Division	Total Agents: 1
23 Main Street New York, NY 10001	SALESPERSON	John Adams	READY			Logout Switch SBU		

11.3.2 Agent Queue - LiveVox Voice Portal

Page 3 of 3

- o A validation step is available to confirm the change of the agent state. Please review the highlighted agent before clicking 'OK' to ensure changes are applied to the correct agent. Once a change is made, the new state of the agent will be displayed in the ACD queue.

Related Topics

[ACD Queues](#)

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11.3.3 Agent Monitoring - LiveVox Voice Portal

Page 1 of 1

AGENT MONITORING

Agent monitoring enables managers to listen to a call in real-time as well as interact with the agent and/or customer. This feature applies to all ACD skills and consists of three different modes:

- Monitor
 - Allows for one way voice monitoring of an agent by a manager.
- Coach
 - Allows for one way voice monitoring with "coaching" from manager.
 - Manager can interject advice/guidance to the agent without other party hearing the conversation.
- Barge
 - Allows manager to conference into a conversation with an agent and caller without any interaction/initiation from the agent.

Related Topics

[ACD Queues](#)

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11.3.4 Accessing the Agent Monitoring Suite - LiveVox Voice Portal

Page 1 of 2

ACCESSING THE AGENT MONITORING SUITE

- To use the monitor, coach and barge functionalities, the connection to the manager's phone must be established by clicking the monitor link on ACD queue page.

<u>Held Queue Summary:</u>	Calls on Hold: 0	Top Hold Name: on hold															
<u>Avg Agent Queue Times:</u>	Avg Waiting Time: 00:00:29	Avg Talking Time: 00:00:00	Avg Wrapup Time: 00:00:00	Avg Unavail Time: 00:00:00													
<u>Last 30 Minutes:</u>	Avg Waiting Time: 00:01:17	Avg Talking Time: 00:00:58	Avg Wrapup Time: 00:01:29	Avg Unavail Time: 00:00:34													
<input type="button" value="Monitor"/> <input type="button" value="Read View"/> <input type="button" value="Graphical View"/> <input type="button" value="Set"/> <input type="button" value="Total Agents: 1"/>																	
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>DID Name</th> <th>Logon ID</th> <th>Name</th> <th>Status</th> <th>Account</th> <th>Customer Phone</th> <th>Classification</th> <th>Duration</th> </tr> </thead> <tbody> <tr> <td>New York Monitor Outbound WPT-AUTHORCALL</td> <td>ADRIANATEXU</td> <td>READY</td> <td></td> <td></td> <td></td> <td></td> <td>00:00:29</td> </tr> </tbody> </table>		DID Name	Logon ID	Name	Status	Account	Customer Phone	Classification	Duration	New York Monitor Outbound WPT-AUTHORCALL	ADRIANATEXU	READY					00:00:29
DID Name	Logon ID	Name	Status	Account	Customer Phone	Classification	Duration										
New York Monitor Outbound WPT-AUTHORCALL	ADRIANATEXU	READY					00:00:29										

- This brings up a dialog box to enter your DID and extension if needed. This phone/extension will receive a call stating, "This is a LiveVox call."



Do not include special characters in the phone number. For instance, (888) 555-1212 would be 8885551212.

<u>Monitors</u>	<input type="button" value="Read View"/> <input type="button" value="Graphical View"/>																				
SIP Name	Logon ID																				
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Extension</th> <th>Name</th> <th>Status</th> <th>Logon</th> </tr> </thead> <tbody> <tr> <td colspan="4"> <input type="text" value="Enter Phone number"/> <input type="button" value="X"/> </td> </tr> <tr> <td>Phone Number:</td> <td colspan="3">4158145720</td> </tr> <tr> <td>Extension:</td> <td colspan="3"><input type="text"/></td> </tr> <tr> <td colspan="4" style="text-align: right;"> <input type="button" value="Submit"/> <input type="button" value="Cancel"/> </td> </tr> </tbody> </table>		Extension	Name	Status	Logon	<input type="text" value="Enter Phone number"/> <input type="button" value="X"/>				Phone Number:	4158145720			Extension:	<input type="text"/>			<input type="button" value="Submit"/> <input type="button" value="Cancel"/>			
Extension	Name	Status	Logon																		
<input type="text" value="Enter Phone number"/> <input type="button" value="X"/>																					
Phone Number:	4158145720																				
Extension:	<input type="text"/>																				
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>																					

- From this point, right click on the agent you'd like to monitor, coach or barge, select the desired action, and wait for the dialog box to confirm.

<u>Monitors</u>	<input type="button" value="Read View"/> <input type="button" value="Graphical View"/> <input type="button" value="Set"/> <input type="button" value="Total Agents: 1"/>														
SIP Name	Logon ID	Name	Date	Account	Customer Phone	Classification	Duration								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="8" style="text-align: center;"> <input type="button" value="Monitor"/> <input type="button" value="Coach"/> <input type="button" value="Barge"/> <hr/> <input type="button" value="Ready"/> <input type="button" value="Not Ready"/> <input type="button" value="Logoff"/> <hr/> <input type="button" value="Drown Out"/> </td> </tr> </table>								<input type="button" value="Monitor"/> <input type="button" value="Coach"/> <input type="button" value="Barge"/> <hr/> <input type="button" value="Ready"/> <input type="button" value="Not Ready"/> <input type="button" value="Logoff"/> <hr/> <input type="button" value="Drown Out"/>							
<input type="button" value="Monitor"/> <input type="button" value="Coach"/> <input type="button" value="Barge"/> <hr/> <input type="button" value="Ready"/> <input type="button" value="Not Ready"/> <input type="button" value="Logoff"/> <hr/> <input type="button" value="Drown Out"/>															

- From there, click 'OK' to confirm your selection.
- Once you establish your monitoring audio path you can select other agents to monitor by right

11.3.4 Accessing the Agent Monitoring Suite - LiveVox Voice Portal

Page 2 of 2

clicking on the other agent and choosing the desired monitor action.

- If you hang up your monitoring audio path the monitoring session will end.
- An agent who is under one of the types of monitoring will have their highlighted background on the ACD queue turn a light green color and the agent's ID will be underlined.

Related Topics

[ACD Queues](#)

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11.3.5 Agent Monitoring by Client Auditors - LiveVox Voice Portal

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AGENT MONITORING BY CLIENT AUDITORS

Client Auditors (see user roles section 13 for more information) may also monitor live agents. Here are the permissions for Client Auditors:

Permissions	Client Auditors
Monitor	Yes
Coach	No
Barge	No
Ready	No
Not Ready	No
Log Off	No
Switch Skill	No

Related Topics[ACD Queues](#)

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PA122

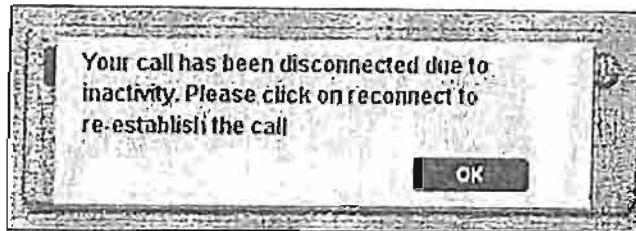
11.3.6 Managing Agent Inactivity - LiveVox Voice Portal

Page 1 of 2

MANAGING AGENT INACTIVITY

After a predefined, non-configurable period agents in a "Not Ready" state will be logged off (audio disconnected) in skills with constant agent audio path connections. This period is 10 minutes for agents logged in via traditional phone lines and 120 minutes for VoIP connections.

- Agents are presented with the following message that indicates they have been disconnected due to "inactivity":



- Agents are presented with the instructions to call back in to re-establish connection or logoff using the 'Logoff' button.
 - 'Logoff' button takes the agent back to the Agent login page;

Agent Login

Login ID:	<input type="text" value="lu_jose"/>
Password:	<input type="password" value="*****"/>
Skill:	<input type="text"/> <input checked="" type="checkbox"/>
Phone/Extension:	<input type="text"/>



After being disconnected the manager's ACD screen shows the agent as "Not Ready".

- Manager's ACD screen prior to the agent being disconnected:

<u>Held Queue Summary:</u>	Calls on Hold:	0	Total Hold Time:	00:00:00				
<u>Avg Agent Queue Time:</u>	Avg Waiting Time:	00:00:00	Avg Talking Time:	00:01:24	Avg Wrapup Time:	00:02:01	Avg HoldWall Time:	00:03:47
<u>Last 30 Minutes:</u>	Avg Waiting Time:	00:07:57	Avg Talking Time:	00:08:01	Avg Wrapup Time:	00:01:30	Avg HoldWall Time:	00:00:33

Manager	Detail View	Registration View	Sort	Total Agents:			
Sales				2			
SLS Name	Logon ID	Name	Date	Account	Customer Phone	Description	Duration
ASURTA, JS_Agent_Bellanca (1)	LY_JOSE	YOLVIA BELLANCA	NOTREADY (00000)				00:03:47

Related Topics

ACD Queues

11.3.6 Managing Agent Inactivity - LiveVox Voice Portal

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PA124

11.3.7 Hold Queue - LiveVox Voice Portal

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HOLD QUEUE

This queue will show you any calls that are currently in the hold queue for that skill. It will provide some basic information about the call that is waiting to be transferred and the number of Available Agents to take a call.

Agent Queue Hold Queue

Agent Queue Summary Available Agents: 37

Skill Name	Account	Name	Customer Phone	Description
777-555-1234	10000000000	TEST 123456	651-555-1234	00012
777-555-1234	10000000000	TEST 123456	651-555-1234	00011

Related Topics

[ACD Queues](#)

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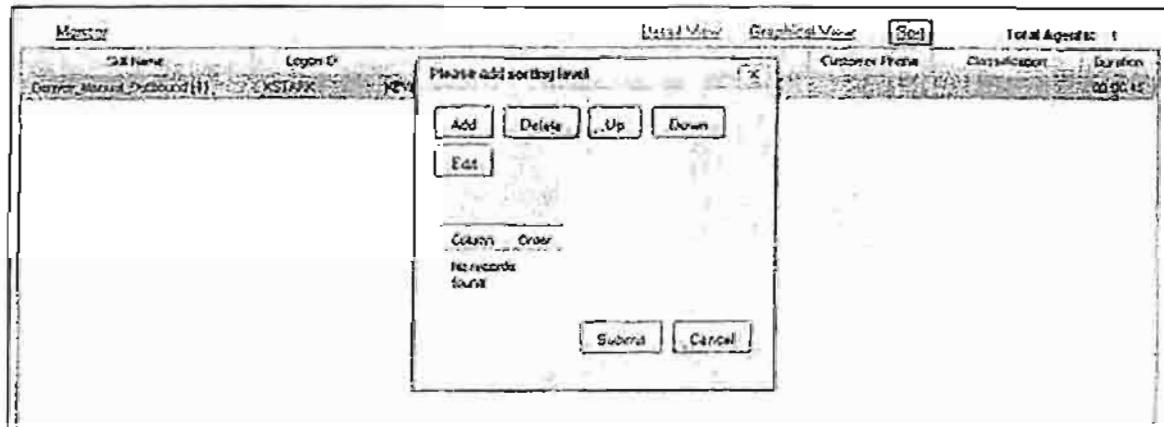
11.3.8 Sort ACD Queue - LiveVox Voice Portal

Page 1 of 3

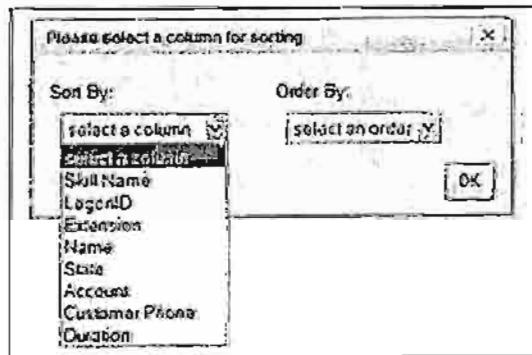
SORT ACD QUEUE

This feature enables multi-level sorting on an ACD queue by managers via a link. Managers can sort any of the columns in the ACD queue in ascending or descending order.

- To access this feature select the 'Sort' link in the ACD queue screen. This will cause a screen pop with a list of sorting templates and the ACD queue sort interface.



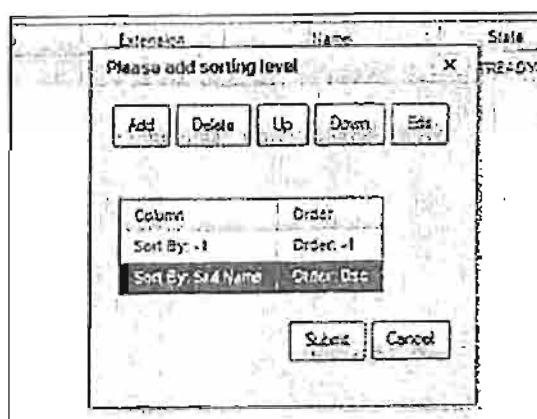
- Click the 'Add' button to create sorting templates. Users are prompted with a list of sorting options. After selecting a 'Sort by' option, users may select ascending or descending order from the 'Order By' dropdown menu. Click 'OK' to return to the sorting interface and a new template with the options selected will be listed.



- The 'Up' and 'Down' buttons allow user to move up or down sorting templates. Users may also delete or edit them.

11.3.8 Sort ACD Queue - LiveVox Voice Portal

Page 2 of 3



- To apply a sorting template, select the template and click 'Submit.'

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11.3.8 Sort ACD Queue - LiveVox Voice Portal

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Related Topics

[ACD Queues](#)

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12 DNC Lists - LiveVox Voice Portal

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DNC LISTS

This section covers Do Not Call Lists (DNC). In all sections of the DNC a star symbol (*) in an account or phone number functions as a wildcard when any character in that location is required. The following items are reviewed in this section:

- 12.1 DNC Categories
- 12.2 Adding A DNC Entry - Two Options: Entry or File
- 12.3 Deleting a DNC Entry
- 12.4 Do Not Call list (DNC) updated based on agent termination code



- *Not all DNC features are enabled by default, including skill specific DNC lists. Contact your account team or Client Services to discuss additional DNC features.*
- *Manual skills do not consider numbers in your Do Not Call list when determining if a number can dial in the Manual skill.*

Click on **DNC LISTS** in the upper left hand corner under Campaigns header menu.

The screenshot shows the LiveVox Voice Portal interface. At the top, there is a navigation bar with links for Campaigns, Reports, Administration, Tools, Help, and Sign Out. Below the navigation bar is a sidebar with several menu items: 'Campaigns' (selected), 'Contact Flow', 'Strategies' (with a checked checkbox), 'Templates', and 'DNC Lists'. The main content area displays a progress report table with columns for Total, Remake, Abandon, CDR, Talk, Wait, Hold, Connect, No Conn, Transfer, Transfer MTO, and Post. The table shows values like 0, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0, and 0. At the bottom of the main content area, there is a footer bar with icons for Home, Log Off, and Help.

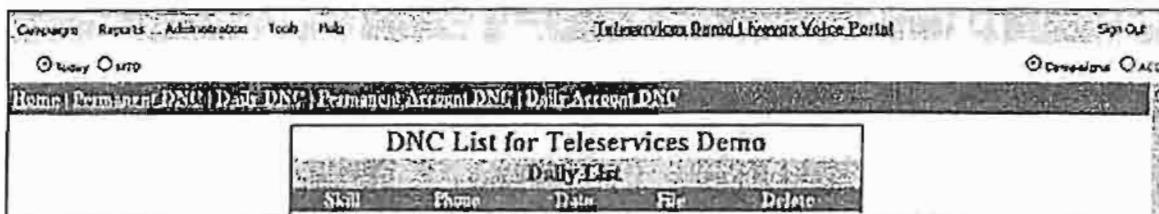
Related Topics

- [DNC Categories](#)
- [Adding a DNC Entry - Two Options: Entry or File](#)
- [Deleting a DNC Entry](#)
- [Do Not Call List \(DNC\) updated based on Call Disposition](#)

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12.1 DNC Categories - LiveVox Voice Portal

Page 1 of 1

DNC CATEGORIES

- Permanent DNC – will add phone #, account # and/or zip code to the permanent DNC list. The number cannot be called until the entry is manually removed – see section 12.3.
 - Phone
 - Account
 - Zip
- Daily DNC – this will place a DNC on phone #, account # and/or zip code for the remainder of that day's dialing period.
 - Phone
 - Account
 - Zip

The screenshot below is the example of the DNC filter/search, and Add New Entry/File user interface.

Filter/Search interface allows you to search for specific DNC files based on phone number and skill. You may select one or more skills to filter information.

Related Topics

[DNC Lists](#)

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12.2 Adding a DNC Entry - Two Options: Entry or File - LiveVox Voice Portal

Page 1 of 2

ADDING A DNC ENTRY - TWO OPTIONS: ENTRY OR FILE

- Entry – enter the phone number in the Entry field and click ‘Add’.
 - To make the entry skill specific, select the skill name from the ‘Skills’ list as shown below.
 - Skills based DNC is enabled by default for daily phone DNC entries. You need to request this option to be enabled for other DNC categories.



Phone numbers may be entered with or without dashes through the dialog.

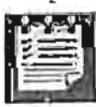
Add New Entry/File

Type:	Daily Phone
Skills:	17797_ATL FS - Manual-1 (5) 17799_ATL FS-Client 2-QC3 (6) 17885_ATLFS - Manual-2 (7) 5607_ATL FS-Client 2-AD1 (1) 5608_ATL FS-Client 2-QC1 (2)
Entry:	814-355-1005
File:	<input type="button" value="Browse..."/>
<input type="button" value="Add"/>	

- File – upload a list of numbers. In the box titled ‘File’, browse to your file and click ‘Add’.

Add New Entry/File

Type:	Daily Phone
Skills:	17797_ATL FS - Manual-1 (5) 17799_ATL FS-Client 2-QC3 (6) 17885_ATL FS - Manual-2 (7) 5607_ATL FS-Client 2-AD1 (1) 5608_ATL FS-Client 2-QC1 (2)
Entry:	<input type="text"/>
File:	C:\Documents and Settings\
<input type="button" value="Browse..."/>	
<input type="button" value="Add"/>	



File should be a text file, 1 phone number per record/line. Example below.

dnc.txt
510-351-6642
925-595-4457

Related Topics

PA131

12.2 Adding a DNC Entry - Two Options: Entry or File - LiveVox Voice Portal

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DNC Lists

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PA132

12.3 Deleting a DNC Entry - LiveVox Voice Portal

Page 1 of 1

DELETING A DNC ENTRY

Click on 'delete' to the right of the phone number you wish to remove from the DNC list.

Phone	Delete
5103516642	delete
9255954457	delete

Related Topics

[DNC Lists](#)

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DO NOT CALL LIST (DNC) UPDATED BASED ON CALL DISPOSITION

This optional feature facilitates the process of adding data to the DNC list. When an agent selects a termination code set for DNC insertion, the system will enter the account number or phone number into the permanent or daily DNC list.



Customers can specify during the setup whether the phone or account number, or both, need to be added into DNC.

12.4 Do Not Call List (DNC) updated based on Call Disposition - LiveVox Voice Portal Page 2 of 3

PA135

12.4 Do Not Call List (DNC) updated based on Call Disposition - LiveVox Voice Portal Page 3 of 3

Related Topics

[DNC Lists](#)

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PA136

16 Optional Features in Agent Desktop (need to be enabled) - LiveVox Voice Portal

Page 1 of 1

OPTIONAL FEATURES IN AGENT DESKTOP (NEED TO BE ENABLED)

LiveVox offers optional additional features on the Agent Desktop. These features are client specific. Check with your supervisor to verify if they are enabled.

This section covers the optional features in the LiveVox Agent Desktop:

- Manual Dialing
- Dynamic Preview Dialing
- Break Codes
- Promise to Pay (PTP) termination code rules
- Agent Volume Control
- Agent Notes
- Call Recording
- Call Transferring
- Scheduled Callbacks
- Call Script Support

Related Topics

[Manual Dialing](#)

[Preview Dialing](#)

[Break Codes and Status Update](#)

[Promise to Pay Termination Codes](#)

[Agent Volume Control](#)

[Agent Notes](#)

[Call Recording](#)

[Call Transferring](#)

[Scheduled Callbacks](#)

[Call Script Support](#)

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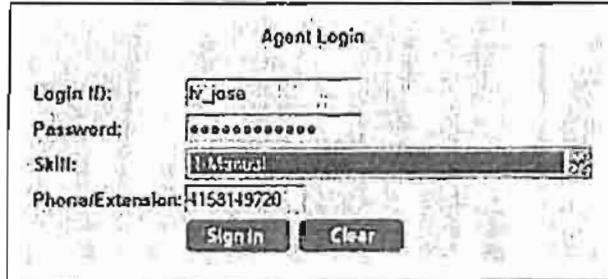
16.1 Manual Dialing - LiveVox Voice Portal

Page 1 of 2

MANUAL DIALING

The LiveVox Agent Desktop allows you to manually enter a phone number and launch a call by using one of the Manual dial skills. No input file with preloaded phone numbers is required – you select the number to dial using an on-screen dialing pad after logging into the skill. To use Manual dialing:

- Login from the agent login site selecting a Manual skill from the skill dropdown menu.



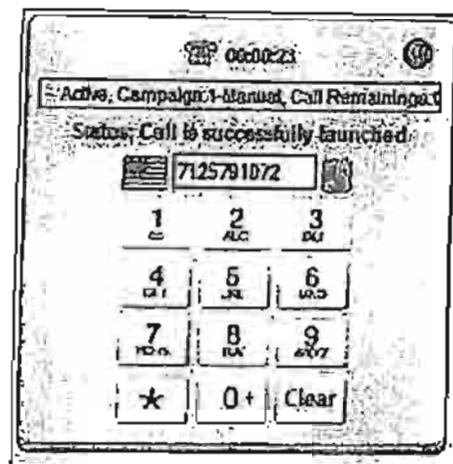
- Once you are logged into a Manual skill, a manual dialing pad is displayed.
- After going into "Ready" status, you can input a 10 digit number and click to launch the call, as shown in the screen below. It is not necessary to put a 1 before the phone number.



- You will then see a screen pop with a successful call launch message.

16.1 Manual Dialing - LiveVox Voice Portal

Page 2 of 2



- When a call is connected, it will immediately be bridged to you.
- After ending the call, you will go into "Wrap Up" mode and be able to select the appropriate termination code.



Please note that Manual skills do not consider numbers in your Do Not Call list when determining if a number can dial in the Manual skill.

Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)
[Dialing Status and Failure Information Available with Manual Skills](#)

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16.1.1 Dialing Status and Failure Information Available with Manual Skills - LiveVox Vo... Page 1 of 3

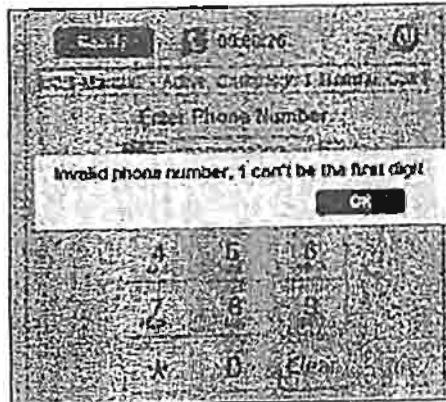
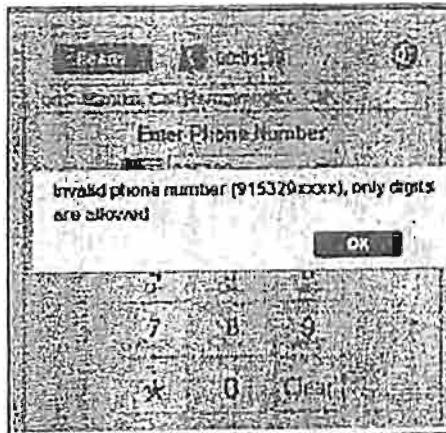
DIALING STATUS AND FAILURE INFORMATION AVAILABLE WITH MANUAL SKILLS

Additional information is available in Agent Desktop about the status of manually launched calls. When a call is launched, you will be notified if it was successful or if it failed and why. When a call fails, you may see the following error messages:

- "No answer" error

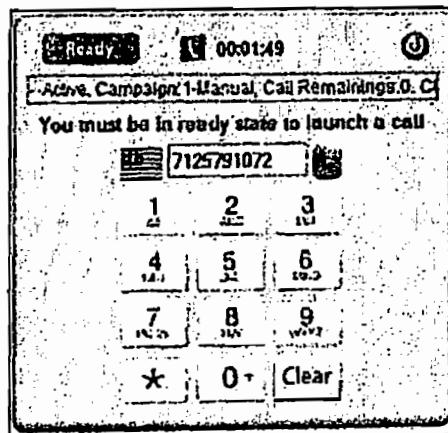


- "Bad number" error

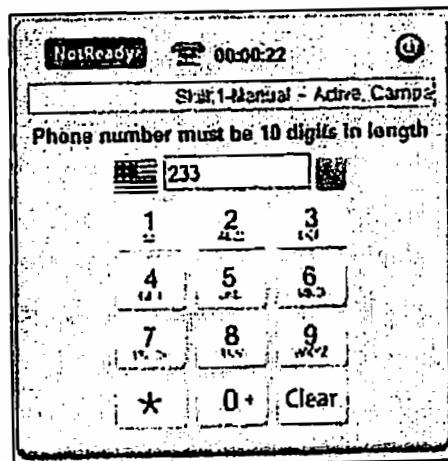


16.1.1 Dialing Status and Failure Information Available with Manual Skills - LiveVox Vo... Page 2 of 3

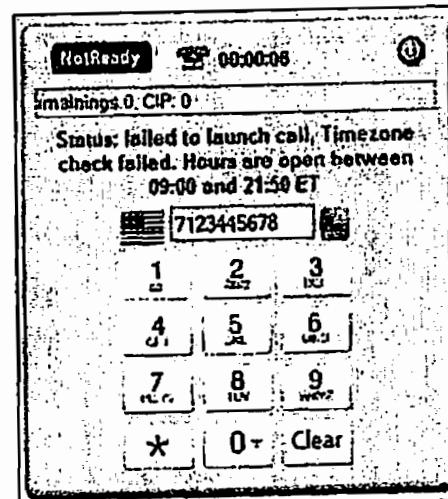
- "Agent in not ready state" error



- "Incomplete phone number" error



- "Attempted to dial outside of your site's dialing policy" error



16.1.1 Dialing Status and Failure Information Available with Manual Skills - LiveVox Vo... Page 3 of 3

Related Topics

[Manual Dialing](#)

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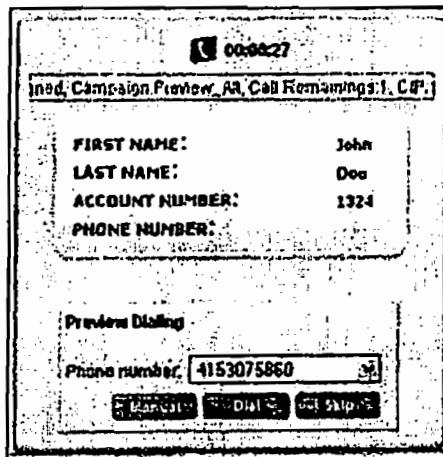
16.2 Preview Dialing - LiveVox Voice Portal

Page 1 of 1

PREVIEW DIALING

The LiveVox Agent Desktop allows you to preview an account before dialing. The preview mode can be set to all phone numbers, or just for wireless numbers. This is controlled at the Skill level.

- When in preview mode, you are prompted with a preview dial screen pop that has account information as well as a "Skip", "Dial" or "Manual" (to manually dial a different number) buttons.



- Select **Dial** to dial the number on the screen.
- Select **Skip** to go to the next account.
- Select **Manual** to input any phone number and dial as you would with a Manual dial skill.



If "skip" is selected, the system will capture the outcome with the system code – "Preview Dial - Agent Skipped (Not Made)".

Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

[Preview Wireless Mode](#)

[Preview All Mode](#)

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16.2.1 Preview Wireless Mode - LiveVox Voice Portal

Page 1 of 1

PREVIEW WIRELESS MODE

Once LiveVox identifies a wireless number, the system will switch from predictive dialing to the preview mode and you will see a screen that displays the cell phone number for you to dial to contact the customer. Once you dial or skip the number you will be returned to the predictive dialing queue.



Related Topics

[Preview Dialing](#)

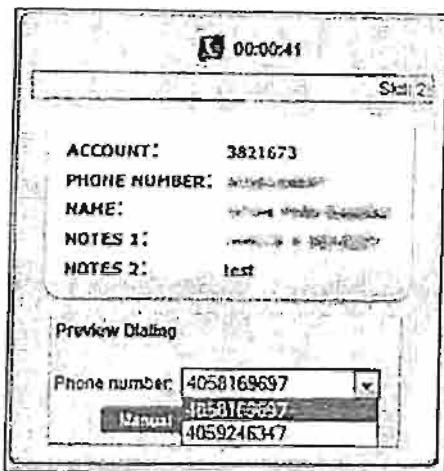
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16.2.2 Preview All Mode - LiveVox Voice Portal

Page 1 of 1

PREVIEW ALL MODE

This mode works the same as the wireless preview, except you will be presented with the list of all records for the account. You can select one to dial or skip.



Once "Skip" or "Dial" is executed, you will move to the next account. You will not be able to go back to the original drop down list and pick another number for the same account.

Related Topics

[Preview Dialing](#)

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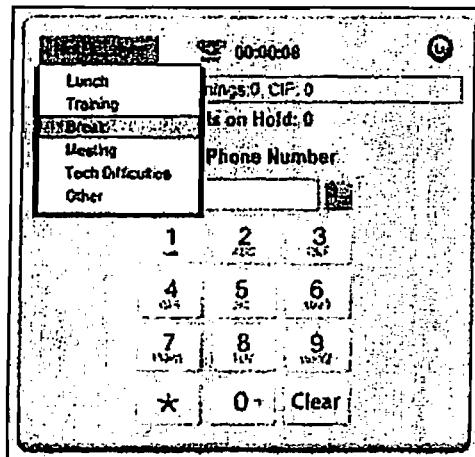
16.3 Break Codes and Status Update - LiveVox Voice Portal

Page 1 of 2

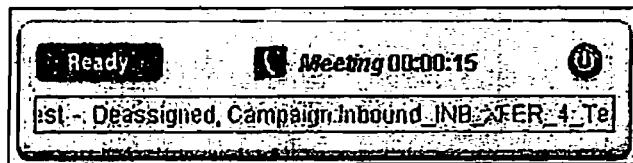
BREAK CODES AND STATUS UPDATE

You may use the **Ready / Not Ready** button when going to or returning from breaks.

- LiveVox provides a subset of six reasons, or break codes, for the "Not Ready" status. When you go into "Not Ready" status, you are prompted to select one of the following options:
 - Lunch
 - Training
 - Break
 - Meeting
 - Tech Difficulties
 - Other



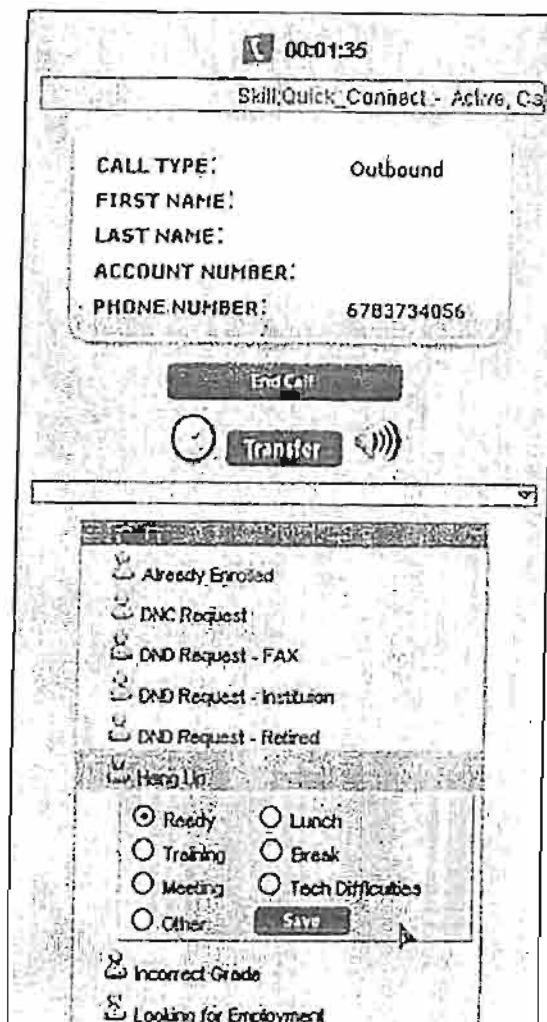
- You may also see your status from the Agent Desktop. In the following example, the agent is in "Not Ready" status with "Meeting" selected as break code.



- You may select the specific "Not Ready" break code to go into from the termination code list upon finishing a call.

16.3 Break Codes and Status Update - LiveVox Voice Portal

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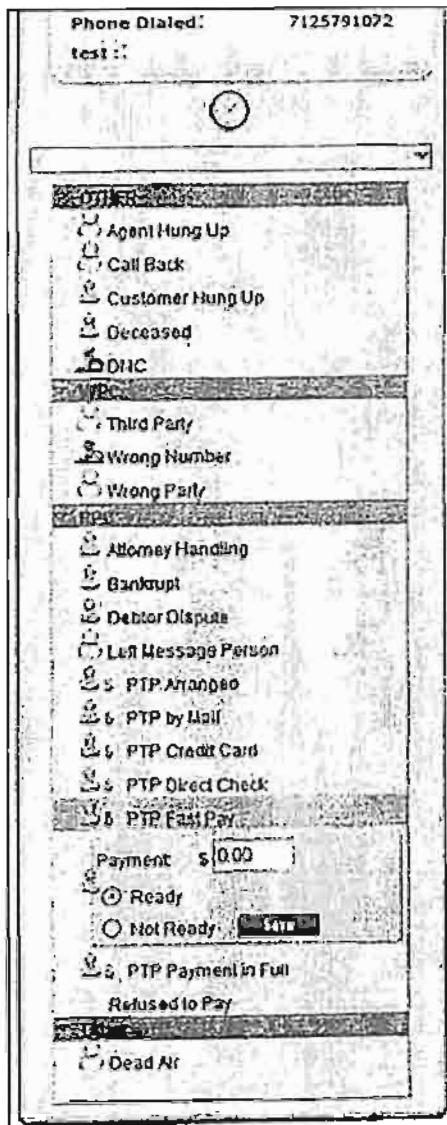
Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

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PROMISE TO PAY TERMINATION CODES

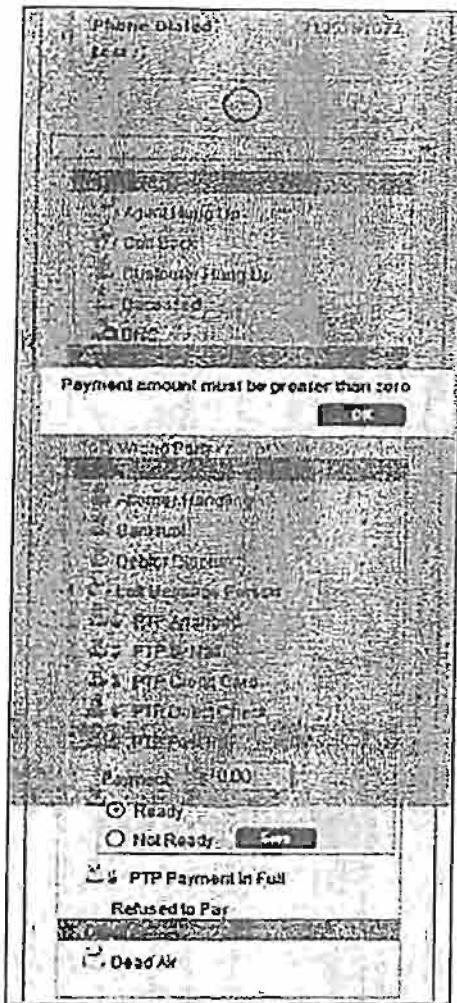
LiveVox is able to track and tally payments in real time through Promise to Pay (PTP) termination codes. If you select any of the PTP codes, you will be prompted to enter a payment amount in the "Payment Amount" field in dollars and cents.



- When selecting a PTP termination code, if you do not enter an amount you will get the following error message to enter an amount greater than zero.

16.4 Promise to Pay Termination Codes - LiveVox Voice Portal

Page 2 of 2



Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

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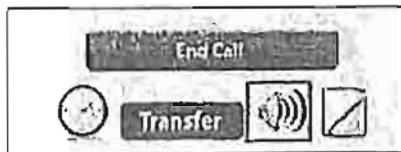
16.5 Agent Volume Control - LiveVox Voice Portal

Page 1 of 1

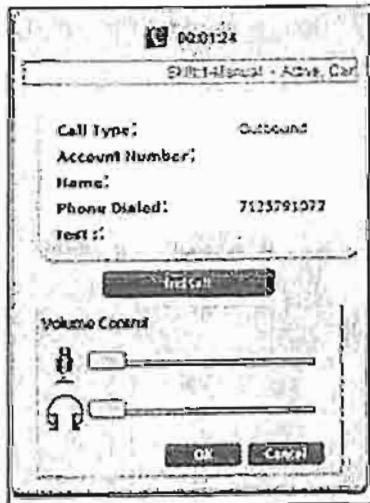
AGENT VOLUME CONTROL

You may adjust volume levels from the Agent Desktop by changing the settings for "Audio In" and "Audio Out". When enabled, it will show on the pop-up while you are "In Call" status.

- Click  to access the agent volume control levels.



- In the Volume Control UI, the headset adjusts your volume, and the microphone adjusts the volume of the customer.



- Click  once you have finished updating the settings.

Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

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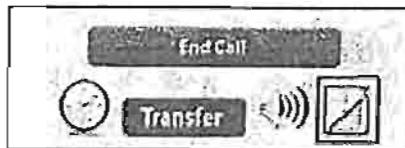
16.6 Agent Notes - LiveVox Voice Portal

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AGENT NOTES

You may enter free form notes from the Agent Desktop. When enabled, it will show on the pop-up while you are in "In Call" or "Wrap up" status.

- Click  to access the agent free form notes UI.



- You will be presented with the below screen where you may input any useful information in the "Notes" text box.



- Click  once you have finished entering information.



Note field is a free form field. It is limited to 200 characters and/or spaces and only works on skills where an Account Number is provided.

Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

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16.7 Call Recording - LiveVox Voice Portal

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CALL RECORDING

Call Recording allows your calls to be recorded. Call Recording begins at the moment a call is bridged to you, and stops when you or the customer ends the call.

Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)
[Pause Call Recording](#)

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16.7.1 Pause Call Recording - LiveVox Voice Portal

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PAUSE CALL RECORDING

You may pause call recording from the Agent Desktop. When enabled, the recording controls will show on the Agent Desktop screen while you are "In Call" status.

- While "In Call" status, you will see the and buttons as shown below. The recording is turned on automatically upon connecting to the call. If call ends with call recording paused, the recording will automatically reinitiate on the next call.

**Related Topics**[Call Recording](#)

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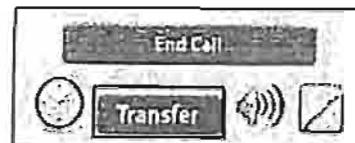
16.8 Call Transferring - LiveVox Voice Portal

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CALL TRANSFERRING

You can transfer calls within the LiveVox Agent Desktop.

- When enabled, the transfer option will appear on your screen while you are "In Call" status.
- Click **Transfer** to access the call transfer menu.



- You will see different transferring options. You may select one of the following transferring options by clicking the specific icon for each option:



- Manual: Enter a number with or without extension to transfer the call.



- Agent: Select a specific agent from a drop-down menu to transfer the call.



- Phone Book: Select frequently used number from a drop-down menu to transfer the call.

Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

[Manual Transfer](#)

[Agent to Agent Transfer](#)

[Frequently Dialed Numbers Phonebook](#)

[Handling Call Transfers](#)

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